

FUNERAL INVESTMENT

Switching Form

FORESTERS
FINANCIAL



Please use CAPITAL letters. Please download and save this form prior to completing online.

We recommend you read the relevant Product Disclosure Statement and seek independent advice prior to making your decisions.

Part 1: Policy Holder Details

Member Number									
Policy Number									
Title	Mr	Mrs	Ms	Miss	Other				
First Name					Middle Name				
Last Name									
Birth Date	D	D	M	M	Y	Y	Y	Y	
Street Address									
Suburb					State			Postcode	
Email									
Contact Number									

Part 2: Switch Details

Please note that your total investment value must be transferred from one investment option to another, meaning 100% of your investment option must be held in a single option. You cannot do partial switches i.e. spread amounts across various options.

Switching from		Switching to	
Capital Guaranteed*	☐	Sustainable Fund	☐
Sustainable Fund	☐	Balanced Fund	☐
Balanced Fund	☐	Growth Fund	☐
Growth Fund	☐	High Growth Fund	☐
High Growth Fund	☐		

*Please note once you switch out from the Capital Guaranteed(CG) option you are unable to switch back in. Existing investors in the market-linked options are unable to switch into the CG option.

Part 3: Declaration and Policy Holder Signature(s)

I/We understand that:

- When choosing an investment option, I/we have considered suitability against risk tolerances and investment return needs.
- Market-linked investment returns are not guaranteed, and past performance is no indication of future investment returns.
- This switching request will be processed using the unit price calculated as at the close of business on the day the request is received. A switching request received after the cut off time will be processed utilising the next available unit price. Unit prices are usually calculated daily. Transaction requests received on a public holiday will be processed utilising the next available price. Foresters Financial has absolute discretion to accept or reject any investment option switch request. Once the investment option switch is processed, a confirmation will be forwarded by email.

This form should be signed by the Policy Holder/s. For Joint Applicants, all Policy Holders must sign. For Assigned policy/s the funeral director must sign.

If signed under power of attorney, the attorney certifies they have not received notice of revocation of the power of attorney and will provide a certified copy of power of attorney along with this form, if not previously provided to Foresters Financial.

Signature of Applicant 1

Full name of Applicant 1

Date

D	D	M	M	Y	Y	Y	Y
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Signature of Applicant 2 (if applicable)

Full name of Applicant 2 (if applicable)

Date

D	D	M	M	Y	Y	Y	Y
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Submit Form

To submit your switch request please:

Email to service@forestersfinancial.com.au

OR

Post to PO Box 7702, Melbourne VIC 3004

Our privacy policy covers how we handle your personal information and is available at www.forestersfinancial.com.au/privacy or by contacting us

ForestersFinancial.com.au

Freecall 1800 645 326

service@forestersfinancial.com.au

PO Box 7702, Melbourne, VIC 3004.

