

ClearView Managed Investments – Application for Withdrawal

Section A: Investor details

Investment number

 : : : : : : : : : :

Investor

 Mr Mrs Miss Ms Other

Given name(s) Surname

Residential address

 Postcode

Postal address (if different from above)

 Postcode

Home phone number Work phone number

Joint Investor

 Mr Mrs Miss Ms Other

Given name(s) Surname

Residential address

 Postcode

Postal address (if different from above)

 Postcode

Home phone number Work phone number

OR Company, Trust or Partnership Name

ACN/ARBN/ABN (please circle)

 : : : : : : : : : :

Contact phone number

Principal place of business, if any (P.O. Box not accepted)

 Postcode

Postal address (if different from above)

 Postcode

Section B: Withdrawal

Partial withdrawal (see Proof of Identity Section)

The total minimum withdrawal across all investment options must be \$500.

I/We request ClearView Financial Management Limited to withdraw an amount as indicated below.

Aggressive	\$
Assertive	\$
Prudent	\$
Cautious	\$
Conservative	\$
Australian Shares Growth	\$
Diversified Growth	\$
Diversified Balanced	\$
Diversified Stable	\$
Monthly Payment	\$

Full withdrawal

I/We request ClearView Financial Management Limited to withdraw the full amount of my/our investment.

Section C: Financial Institution account details

Please provide details of the financial institution account to which you want your withdrawal to be paid.

Name and address of financial institution

 Postcode

BSB number Account number

 -

Type of account

 Savings Cheque Statement Other

Account name

Please note: you will need to check with your financial institution that the account you have nominated above is able to accept electronic transfers.

Section D: Proof of Identity*

I have attached a certified copy of my driver's licence or passport.

OR

I have attached certified copies of both:
Birth/Citizenship Certificate or Centrelink Pension Card
AND
Centrelink Payment letter or Government notice (less than 1 year old) with name/address.

If you are unable to meet the above 'Proof of Identity' requirements please contact us on 132 977.

*If you have already provided complying Proof of Identity documents in the past five years, you need not resubmit this information with your partial withdrawal request.

If the expiry date on any of your Proof of Identity documentation previously provided has expired, you will need to resubmit current Proof of Identity information.

Signature(s) of Investor(s)

I/We agree that ClearView Financial Management Limited is discharged from any liability under the Constitution in connection with the withdrawn Investment on payment of the withdrawal value of the Investment, as I/we have directed.

I/We have read and consent to the collection, use and disclosure of my/our personal information as set out in the Our Privacy Policy section.

Individuals declaration and signature

I/We understand:

- that if I/we do not provide all required information, my/our request will not be actioned;
- my/our request will be deemed to be received and will be actioned on the day ClearView receives all required information.

If there is more than one investor, all investors must sign (unless you have previously indicated that only certain signatures were required).

Where a company is an investor, a Company Seal must be used along with two signatures. These signatures can be from two directors or a director and a company secretary.

Company Seal
(If applicable)

If signed under Power of Attorney, the Attorney verifies that no notice of revocation of that power has been received.



This form can be posted (no stamp required) to:

ClearView
Client Administration
Reply Paid 4232
Sydney NSW 2001



If you have any questions about this form,
please call us on

132 977

Signature 1

X

DATE / /

Signature 2

X

DATE / /

Reason for withdrawal (optional)

What is the reason for making this withdrawal?

(This information is requested for statistical purposes only and will remain strictly confidential)

Our Privacy Policy

Further information on how we handle your personal information is explained in our Information Handling Policy including:

- how to contact us regarding Privacy;
- how to inform us to change your marketing consent; and
- how to access your personal information.

You can obtain a copy of our Information Handling Policy by calling us on 1800 265 744 or by visiting our website at www.clearview.com.au