

Section 1: Please Complete this Section for all Instructions

I/We _____
of _____
Unit Holder Name(s)
Address

Phone: _____
(Please supply a phone number in case we need to contact you about your request)

Being Unit Holder Number: (name of fund)

hereby request the following alteration to my/our investment in accordance with the provisions in the Trust Deed.

Dated this _____ Day of _____ 20 _____

Signed: _____

*In the case of joint unit holders, ALL must sign.
Companies must sign in accordance with the Companies Act 1993 and the company's constitution*

Section 2: Type of Request

Please indicate below the type of request you wish to make, then complete the section indicated.

- Change address or contact information: Please complete Section 3
- Alter regular investment Please complete Section 4

Section 3: Please Complete this Section for a Change of Address or Contact Details

Please change the contact details for the Unit Holding as specified in Section 1 to:

New Address: _____

Phone (Home): _____ Phone (Business): _____

Mobile: _____ Fax: _____

Email Address: _____

Section 4: Please Complete this for Alterations to Regular Investments by Direct Debit

I/We wish to increase/decrease (delete one) the regular monthly investment for the Unit Holding specified in Section 1 to: \$

This amendment is to be effective from: _____ / _____ /20

I/We wish to cancel our the regular monthly investment for the Unit Holding specified in Section 1 with effect from: _____ / _____ /20

Other Instructions: _____

Please Note: To change the account for your deductions you must complete and post in a new Direct Debit Authority Form