

# Shadforth Portfolio Service – Investment

25 February 2019

## Withdrawal Form – Investment

- **Shadforth Portfolio Service – Investment**

Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** and ✓ boxes where provided.

### Step 1: Client details

Account number

Title (Dr/Mr/Mrs/Ms/Miss)  Surname

Given name(s)

Mailing address

Suburb  State  Postcode

Phone (home)    Phone (work)

Mobile

Email

Date of birth  /  /

### Step 2: Withdrawal instructions

Full withdrawal (Please proceed to Step 3)

**OR**

Partial withdrawal

Please specify amount \$

### Partial withdrawals only – investment options to be redeemed

Investment fund name	Amount	OR Allocation (%)
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	<input type="text"/>

If you do not select the investment options to be redeemed, your investments will be redeemed on the basis of your existing nominated Cash Account top-up method.

**Note:** Partial withdrawals must be for \$2,000 or more in total and \$200 per managed investment option.

### Step 3: Financial institution details

Please direct credit the withdrawal to my nominated financial institution details for ad hoc withdrawals.

**OR**

Please direct credit the withdrawal to the following financial institution details:

Name of financial institution

Account name

BSB  -  Account number

I want to nominate the above financial institution details for all future ad hoc withdrawals.

**Note:**

- If bank account details are not supplied, or unclear, the payment will be paid to you by cheque and sent to the above mailing address.
- Funds cannot be credited to a third party bank account.

### Step 4: Client declaration

**Important note:** The Service Operator collects the information in this form in order to process your investment instructions. Any personal information provided in this form will be handled in accordance with the Service Operator's privacy policy, available at [www.sfg.com.au/portfolio/privacy](http://www.sfg.com.au/portfolio/privacy).

By signing this request form I am making the following statements:

- I declare I have fully read this form and the information completed is true and correct.
- I understand that all investment options will be converted to cash prior to transferring out of my account.

Client signature

Date  /  /

**Please forward all correspondence and enquiries to**

**Post:** Shadforth Portfolio Service  
GPO Box 264, Melbourne VIC 8060

**Email:** [portfolioservice@sfg.com.au](mailto:portfolioservice@sfg.com.au)

**Telephone:** 1800 931 792

**Web:** [portfolio.sfg.com.au](http://portfolio.sfg.com.au)