

Direct Debit Savings Plan Form



Request and Authority to debit the account names below to pay Automic Group

REQUEST AND AUTHORITY TO DEBIT

Fund Name

Monthly Savings Plan Amount (minimum amount \$1,000)

Registered Holding Name

Holder Number (SRN)

Request and authorise Automic Group to arrange, through its own financial institution, a debit from your nominated account. The debit will be made through the Bulk Electronic Clearing System (BECS) from your account held at the financial institution you have nominated below and will be subject to the terms and conditions of the Direct Debit Service Agreement.

Insert the Name and Address of the Financial Institution at which the Account is Held

Financial Institution Name

Address

Insert Details of Account to be Debited

Name/s on Account

BSB number (must be 6 digits)

Account Number

Acknowledgment [Sign Here](#) - This section must be signed for your instructions to be executed

Individual or Unitholder

Unitholder 2

Unitholder 3

Sole Director or

Sole Director and Sole Company Secretary

Director

Director/Company Secretary

Individual:

This form is to be signed by the unitholder.

Joint Holding:

Where the holding is in more than one name, all of the unitholders must sign.

Power of Attorney:

To sign as Power of Attorney, you must have already lodged it with the registry. Alternatively, attach a certified photocopy of the Power of Attorney to this form.

Companies:

To be signed in accordance with your Constitution. Please sign in the appropriate box which indicates the office held by you.

Day Month Year

Please send your signed form to:

Automic Group
GPO Box 5193
Sydney, NSW 2001

forager@automicgroup.com.au

Collection Statement

As a fund registry provider, Automic Pty Ltd (ACN 152 260 814) (Automic Group) requires information about you (including contact information such as your name and address, and your financial institution account details) for the primary purpose of providing a service to you. This collection is authorised by law and without collecting this information we may be unable to provide you with the service requested in this document. We may disclose the information that is related to the primary purpose to third parties including Automic Group's financial institution. Further relevant information is found in our Privacy Policy which is available on the Automic Group website www.automicgroup.com.au



DIRECT DEBIT SERVICES AGREEMENT

The following is your Direct Debit Service Agreement with Automic Group. The agreement explains your obligations when undertaking a Direct Debit arrangement with us. It also details what our obligations are to you as your Direct Debit Provider.

We recommend you keep this agreement in a safe place for future reference. It forms part of the terms and conditions of your Direct Debit Request (DDR) and should be read in conjunction with your Direct Debit Request form or additional application form (as applicable).

DEFINITIONS

Account means the account held at your financial institution from which we are authorised to arrange for funds to be debited.

Agreement means this direct debit request service agreement between you and us.

Banking day means a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.

Debit day means the day that payment by you to us is due.

Debit payment means a particular transaction where a debit is made.

Direct debit request means the Direct Debit Request in the application form or additional application form Us or we means Automic, (the Debit User) you have authorised by signing a Direct Debit Request.

You means the customer who has signed or authorised by other means the Direct Debit Request.

Your financial institution means the financial institution nominated by you on the DDR at which the account is maintained.

DEBITING YOUR ACCOUNT

By signing a Direct Debit Request or by providing us with a valid instruction, you have authorised us to arrange for funds to be debited from your account. You should refer to the Direct Debit Request and this agreement for the terms of the arrangement between us and you.

We will only arrange for funds to be debited from your account as authorised in the Direct Debit Request. If the debit day falls on a day that is not a banking day, we may direct your financial institution to debit your account on the following banking day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

All Direct Debit payments for initial applications will be made in accordance with the cut off times published in a Fund's Product Disclosure Statement. It takes three days for the request to be cleared. Upon confirmation that the funds are cleared we will apply for units in the relevant fund on your behalf.

AMENDMENTS BY US

We may vary any details of this agreement or a Direct Debit Request at any time by giving you at least fourteen (14) days written notice.

AMENDMENTS BY YOU

You may change, stop or defer a debit payment, or terminate this agreement by providing us with at least fourteen (14) days notification by contacting us at:

Automic Group
GPO Box 5193
Sydney, NSW 2001

Phone: +61 (0)2 9698 5414

Email: forager@automicgroup.com.au



YOUR OBLIGATIONS

It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the Direct Debit Request.

If there are insufficient clear funds in your account to meet a debit payment:

- you may be charged a fee and/or interest by your financial institution;
- you may also incur fees or charges imposed or incurred by us; and
- you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

You should check your account statement to verify that the amounts debited from your account are correct.

If Automic Group is liable to pay goods and services tax (“GST”) on a supply made in connection with this agreement, then you agree to pay Automic Group on demand an amount equal to the consideration payable for the supply multiplied by the prevailing GST rate.

DISPUTE

If you believe that there has been an error in debiting your account, you should notify us directly on +61 (0)2 9698 5414 and confirm that notice in writing with us as soon as possible so that we can resolve your query quickly. Alternatively, you can take it up with your financial institution directly.

If we conclude as a result of investigations that your account has been incorrectly debited, we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.

If we conclude as a result of our investigations that your account has not been incorrectly debited, we will respond to your query by providing you with reasons and any evidence for this finding in writing.

ACCOUNTS

Please carefully check:

- with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions
- your account details which you have provided to us are correct by checking them against a recent account statement; and
- with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request.

CONFIDENTIALITY

We will keep any information (including your account details) in your Direct Debit Request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.

We will only disclose information that we have about you:

- to the extent specifically required by law; or
- for the purposes of this agreement (including disclosing information in connection with any query or claim).

NOTICE

If you wish to notify us in writing about anything relating to this agreement, you should write to:

Automic Group
GPO Box 5193, Sydney, NSW 2001

We will notify you by sending a notice in the ordinary post to the address you have given us in the Direct Debit Request.

Any notice will be deemed to have been received on the third banking day after posting.