

Ifsinvest - pre-application form

Thank you for your interest in ifsinvest.

If you have read the Disclosure Documents* and think you would like to invest, then please complete this Pre-Application Form. We will use this information to create an Application Form for you. A copy of your Application Form will then be sent to you. If you wish to proceed with investing, you will need to:

- Carefully review the Application Form
- Confirm that all of the details are correct
- Sign the Application Form
- Return the signed Application Form to the Client Care Team for processing.

Please note this form is not an application form and by completing this form you are not agreeing to invest in ifsinvest.

Applicant one

Title	<input type="text"/>	First name	<input type="text"/>
Middle name	<input type="text"/>	Last name	<input type="text"/>
Residential address	<input type="text"/>		
Previous if less 3 yrs	<input type="text"/>		
Email	<input type="text"/>		
Mobile	<input type="text"/>	Home phone	<input type="text"/>
Gender	<input type="text"/>	Date of birth	<input type="text"/>
Country of birth	<input type="text"/>	Citizenship	<input type="text"/>
Employment status	<input type="text"/>	Industry	<input type="text"/>
Occupation	<input type="text"/>	Employer	<input type="text"/>
Mother's maiden	<input type="text"/>		
Tax file number	<input type="text"/>	Or exemption	<input type="text"/>

Applicant two (if applicable)

Title	<input type="text"/>	First name	<input type="text"/>
Middle name	<input type="text"/>	Last name	<input type="text"/>
Residential address	<input type="text"/>		
Previous if less 3 yrs	<input type="text"/>		
Email	<input type="text"/>		
Mobile	<input type="text"/>	Home phone	<input type="text"/>
Gender	<input type="text"/>	Date of birth	<input type="text"/>
Country of birth	<input type="text"/>	Citizenship	<input type="text"/>
Employment status	<input type="text"/>	Industry	<input type="text"/>
Occupation	<input type="text"/>	Employer	<input type="text"/>
Mother's maiden	<input type="text"/>		
Tax file number	<input type="text"/>	Or exemption	<input type="text"/>

What is your initial investment amount?

Funds will not be deducted from your account until the application form has been signed and returned back to us.

Deposit amount	<input type="text"/>	Source of funds	<input type="text"/>
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Bank Details

Funds will not be deducted from your account until the application form has been signed and returned back to us.

Account Name	<input type="text"/>		
Bank Name	<input type="text"/>	Branch	<input type="text"/>
BSB	<input type="text"/>	Account Number	<input type="text"/>

Identification Requirements:

To process your Pre-Application Form, we need to confirm your identity. The following information will allow us to electronically verify who you are.

If we are unsuccessful in verifying your identify we may need to request certified copies of your identity documents.

Applicant one identification

Driver's Licence No.	<input type="text"/>	State issued	<input type="text"/>
Expiry date	<input type="text"/>		<input type="text"/>
Medicare No.	<input type="text"/>	Your ref number	<input type="text"/>
Expiry date	<input type="text"/>		<input type="text"/>

Applicant two identification

Driver's Licence No.	<input type="text"/>	State issued	<input type="text"/>
Expiry date	<input type="text"/>		<input type="text"/>
Medicare No.	<input type="text"/>	Your ref number	<input type="text"/>
Expiry date	<input type="text"/>		<input type="text"/>

Important Note

This note contains important information. Please read this information carefully, and if you have questions contact the ifsinvest Client Care Team 1300 734 496.

1. This is a Pre-Application Form only. It is not an Application Form to invest in ifsinvest. No investments will be made on the basis of this form. Monies will not be deducted from any accounts based on this form.
2. Legg Mason Australia and/or affiliated parties will use the information in this Pre-Application Form to create an Application Form for you on your behalf.
3. A copy of your Application form will be sent to you. To invest, you will need to review that form, sign it and return it to the Client Care Team for processing.
4. By completing this Pre-Application Form you are consenting to Legg Mason Australia collecting, storing, and using your personal information. We will only use your personal information to provide you with our services and the services of OneVue Wealth Services. Legg Mason Australia will not share your personal information with third parties. More information about how we deal with your personal information is set out in our Privacy Statement which is available from www.ifs.net.au
5. By providing this form, Legg Mason Australia is not guaranteeing the performance of ifsinvest or any of the investment options in ifsinvest.
6. Before deciding whether to invest in ifsinvest you should read the Disclosure Documents, available at www.ifs.net.au and decide whether ifsinvest is right for you. We recommend that you seek financial advice from a financial planner before investing.