The Public Trustee

INVESTMENT WITHDRAWAL FORM

Please complete this form in BLOCK letters with a black pen

1. CLIENT NUMBER

What is your Client Number?

2. ACCOUNT NAME

Individual Investor (1)	Title (eg: Mr/Mrs/Ms)		Surname	
	Given Names			
Individual Investor (2) - if joint	Title (eg: Mr/Mrs/Ms)		Surname	
	Given Names			
Other Investors	Investment Name			
	Contact Person			

3. CONTACT DETAILS

Postal Address	Street / PO		
	Suburb	State	Postcode
Telephone	Daytime ( )	Mobile	

4. WITHDRAWAL INSTRUCTIONS

The minimum withdrawal amount is $1,000, or the balance of your investment if the value of your investment is less than $1,000.

Write the dollar amount, or if full withdrawal, write "Balance".

Fund	***$ Amount*** *(or **"Balance"** if full withdrawal)*
PTIF Growth	
PT Cash A/c (At Call)	
Term Investment A/c	

5. PAYMENT INSTRUCTIONS

Please direct my/our withdrawal as follows:

- ◯ Deposit into my/our previously nominated Financial Institution account OR
- ◯ Deposit into my/our Financial Institution as follows:

Name of Bank	
Bank Suburb	
BSB No.	__ __ __ -- __ __ __
Account No.	__ __ __ __ __ __ __ __ __ __ __ *(Account No. is numeric only)*
Account Name *(eg B.Goode)*	

Note: Your Australian Financial Institution Account (AFIA) must be verified before your withdrawal will be accepted. If you have not already done so please supply an AFI Statement of Account or letter containing the logo of your AFI, your name and the account and account number. All copies must be certified unless original. Please blank out account balances and transactions

6. SIGNATURE(S) OF INVESTOR(S)

Date: / /

Signature 1

Other than Individuals: position eg Director, Treasurer

Date: / /

Signature 2

Other than Individuals: position eg Director, Treasurer

IMPORTANT NOTICE Withdrawals cannot be processed until all necessary documentation is completed.
Withdrawals from funds must be signed by the Authorised Investor according to the Application Form.
If signed under **Power of Attorney**, the attorney hereby certifies that he/she has not received notice of revocation of that power (the power or a certified copy is required to be forwarded for notation).
Withdrawals by companies must be executed under seal or by an authorised officer of the company or under a power of attorney.
The Public Trustee has implemented the Queensland Government Privacy Scheme for the collection, storage, use and disclosure of personal information. Details of the Queensland Government Privacy Scheme are available on our website www.pt.qld.gov.au/legal/privacy.htm or from any office of The Public Trustee of Queensland.

Company Seal

7. INTERNAL USE ONLY

Trust Officer Use Only

Received Date:_____ Time:_____

Client signature verified by: _____ *signature* / /

position ID *date*

Investment Services Use Only

☐ *CIF verified* ☐ *AFIA verified* *cash a/c balance $*____

entered in CIMS by: _____ / /

signature *position ID* *date*

authorised in CIMS by: _____ / /

signature *position ID* *date*

☐ *PEP Verified* *Director Investment and Taxation Services* *signature* *date*