

# WealthBuilder\$ – Portfolio Package

Structure your personal and investment loans with our Portfolio Package, a simple, structured investment loan that allows you to organise your sub-accounts the way you want them. Your personal information is collected on this form for your reference only. It is not used or disclosed for any other purpose. For further information about how we use, disclose and secure your personal information, please refer to our Privacy Policy which is available at [bankvic.com.au/privacy](http://bankvic.com.au/privacy) and on request.

Member name

Date

Estimated portfolio limit:  
(subject to valuation/assessment)

<b>Sub loan account 1</b>	<b>Sub loan account 2</b>	<b>Sub loan account 3</b>	<b>Sub loan account 4</b>	<b>Sub loan account 5</b>	<b>Sub loan account 6</b>
Sub account name:	Sub account name:	Sub account name:	Sub account name:	Sub account name:	Sub account name:
Purpose:	Purpose:	Purpose:	Purpose:	Purpose:	Purpose:
Balance \$	Balance \$	Balance \$	Balance \$	Balance \$	Balance \$
Loan type:	Loan type:	Loan type:	Loan type:	Loan type:	Loan type:
<b>Transaction account 1</b>	<b>Transaction account 2</b>	<b>Transaction account 3</b>	<b>Transaction account 4</b>	<b>Transaction account 5</b>	<b>Transaction account 6</b>
Account type:	Account type:	Account type:	Account type:	Account type:	Account type:
Offset facility:	Offset facility:	Offset facility:	Offset facility:	Offset facility:	Offset facility:
Yes      No	Yes      No	Yes      No	Yes      No	Yes      No	Yes      No
Overdraft \$:	Overdraft \$:	Overdraft \$:	Overdraft \$:	Overdraft \$:	Overdraft \$:
<b>Other products</b>					
credit card	home insurance	car insurance	pleasure craft insurance	CCI	
financial planning	contents insurance	landlord insurance	motorcycle insurance	travel insurance	

Police Financial Services Limited ABN 33 087 654 661 trading as BankVic | AFSL and Australian Credit Licence 240293 This is only an illustration and does not take into account your financial goals and circumstances. To assist you in structuring your loan/s, a home loan consultant can help you explore your option. We recommend that you seek advice from your accountant or financial planner to ensure your structure supports your goals, lifestyle and personal circumstances. Applications for credit are subject to BankVic's credit approval criteria. Fees and charges apply. WealthBuilder\$ package: Annual fee of \$375 and terms and conditions apply. Fees and charges may also apply to your loan or through your use of the overdraft facility. Information on terms and charges, interest rates and fees & charges are available on our website, on application or request. Any advice is general advice only and has been prepared without taking account of your objectives, financial situation or needs. Before acting on the advice you should consider whether the advice is appropriate for you. Before you make any decision to acquire any product or service you should obtain and consider the relevant Product Disclosure Statement at a branch or by calling 13 63 73. Terms, conditions, limits and exclusions apply. As an AFSL holder, we sell general insurance products under an agreement with Insurance Australia Limited ABN 11 000 016 722 AFSL 227681 trading as CGU Insurance. If you purchase insurance we will receive a commission that is a percentage of the premium. Ask us for more details before we provide you with any of these services. T:13 63 73 [bankvic.com.au](http://bankvic.com.au) 4.17 6355vb

