Perpetual

**Perpetual's DIY Super**

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual Trustee Company Limited ABN 42 000 001 007 AFSL 236643

This form can be used by members of the Self Managed Super Fund Service (SMSF Service) and members of the Trustee Service.

# Investment instruction

To be completed by the Member or their previously authorised financial adviser. Please complete this form in black ink, using BLOCK letters.

## Investment details

superannuation fund name

account number

member name

## Adviser details

financial adviser

dealer group

| Buy/sell | Name of investment/security | ASX/APIR code | number of shares/units | $ amount (est) | already placed with broker Y/N |
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| | | | Total ($) | | |

**Service type:** SMSF Trustee **Asset holding:** Segregated Unsegregated

## Confirmations and undertakings

Please arrange for the sale/redemption and/or the purchase/lodgement, of the investments listed above, from my member account within the above named superannuation fund.

I have discussed this transaction with my Financial Adviser.

signature date / /

signature date / /

signature date / /

signature date / /

Note: If the fund does not have segregated member accounts **all** members of Trustee Service or all members/trustees of SMSF Service must sign this form.

## Office use only

| PACT code | Transacted by | Date ordered placed | within strategy |
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Authorised by

signature _____ date __ __ / __ __ / __ __ __ __

The Self Managed Super Fund Service (SMSF Service) and the Trustee Service offer members the ability to recommend specific investments to the trustee. For SMSF Service Members provided the request complies with the various provisions of SIS and the standard SMSF Service trust deed, we are able (but not bound) to act on this request after receipt of your instructions. For Trustee Service members provided the request complies with the various provisions of SIS, the trust deed and Perpetual Superannuation Limited Investment Policy Perpetual as trustee is able (but not bound) to act on this request after receipt of your instructions. If for any reason we cannot act on a request, we will notify you. We will use reasonable endeavours to give effect to your request as soon as practicable, however we are not responsible for delays beyond our control. We will only act on buying instructions if there are sufficient cleared funds available in your cash account. We will contact you if the funds are not available.
When you sell investments the proceeds will be credited to your cash account within the fund.

**Please fax this form to your Account Manager – Sydney 02 8256 1451**

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