



### 3a. Investment Strategy Update

Please update my Investment Strategy to reflect the above switch.

<input type="checkbox"/> yes	<input type="checkbox"/> no
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Please note, your investment strategy is used for the auto-rebalancing feature, and pension payments (where applicable).  
If no selection is made, 'Yes' will be assumed.

### 3b. Auto-rebalancing

Please note this section is only applicable if this switch represents your first investment into Perpetual Geared Australian and Perpetual Global Resources Investment Options and you currently do not have auto-rebalancing.

<input type="checkbox"/> yes	<input type="checkbox"/> no	frequency: <input type="checkbox"/> quarterly	<input type="checkbox"/> half yearly	<input type="checkbox"/> annually
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If no selection is made, 'Yes' will be assumed. If you do not nominate a frequency the default of 'Quarterly' will be assumed. The investment strategy will be based on your investments after the switch unless specified in writing by you. This will also form the basis of your pension payments.

## 4. Applicant signature and declaration

**Please note:** The terms and conditions for the investment options you have selected may differ from your previous selection. Please contact your financial adviser, call our Investor Services Centre on 1800 022 033 or visit our website at [www.perpetual.com.au](http://www.perpetual.com.au) for a copy of the current Product Disclosure Statement with details of all available investment options.

#### Perpetual Geared Australian and Perpetual Global Resources Investment Options

(You must read and sign the below if this switch represents your first investment into Perpetual Geared Australian and/or Perpetual Global Resources Investment Options)

I have thoroughly read the 'Understanding investment risk', 'Gearing risk' and 'Limits for Perpetual Geared Australian and Perpetual Global Resources Investment Options' sections of the WealthFocus Pension/Wholesale Pension Plan PDS Part 1 (the PDS). I understand the greater risks associated with my selection of the Perpetual Geared Australian and/or Perpetual Global Resources Investment Options and that it has a suggested investment timeframe of seven years or more.

I acknowledge and accept that, if the value of my investment in Perpetual Geared Australian and/or Perpetual Global Resources Investment Options has risen above or falls below my nominated percentage allocation (or the default percentage allocation if I do not make a nomination) at my nominated review date (or the default frequency if I do not make a nomination) it will be automatically rebalanced to my nominated percentage allocation (or default percentage allocation) across my investments. I acknowledge that the buy/sell spread will apply to this rebalancing transaction.

signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
print name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Forward your completed form to your financial adviser or deliver to Perpetual's Sydney office at Level 12, 123 Pitt Street, Sydney. Alternatively, you can post the form to **Reply Paid 4171, Perpetual WealthFocus Pension Plan, GPO Box 4171, Sydney NSW 2001 Australia** (No stamp required if posted in Australia to this address).