

Perpetual's Pooled Super Trust

Applying for an investment

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General requirements

Please note:

- you should read the PDS before applying for an investment
- the applicant must be the trustee of a complying superannuation entity
- investment amounts need not be in whole dollars
- there is no maximum investment amount
- cash amounts are not accepted, however we can determine other acceptable methods of payment
- the PST doesn't accept investments that represent segregated current pension assets
- for trust investors, only the trustee has rights and obligations under the PST
- if signed under power of attorney:
 - the attorney certifies that he or she has not received notice of revocation of the power
 - the power of attorney, or a certified copy, must be sent to us
- we have absolute discretion to accept, reject or limit any application.

Authorised signatories

If no amendments have been made, the authorised signatories to your investment are the individuals (including directors/secretary of a corporate trustee) or attorney who signed the initial investment application form.

You can add authorised signatories or change the authorised signatories by written request signed by all existing authorised signatories and all new authorised signatories.

Initial investments

Your initial investment in the PST must be at least \$100,000.

To invest in the PST, you should complete the application form and send it to us, together with a cheque for your initial investment amount made payable to '**PIML – PST – [insert name of applicant(s)]**'.

Additional investments

If you are already invested in the PST, you can make additional investments via **BPAY** (minimum \$2,000) – simply remit your additional investment to us quoting your **Customer Reference Number (CRN)** and **BPAY biller code 989442**.

Lodging your application form

You can lodge your completed application form (including your cheque) with your financial adviser or at our Sydney office or post (no stamp required if posted in Australia) to:

Reply Paid 4171
Perpetual's Pooled Super Trust
GPO Box 4171
Sydney NSW 2001

Perpetual 

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Perpetual's Pooled Super Trust

Product Disclosure Statement issue number 9 dated 30 September 2022

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315

Application form

Please complete all pages of this form in black ink using BLOCK letters.

If you are a current investor in the PST, please complete:

client number	<input type="checkbox"/>	please add to my/our existing account number
account number	<input type="checkbox"/>	please create a new account number for this investment

If you are a current investor in the PST and no selection is made, we will add your investment to your existing account number.

1. Investor details (must be completed)

fund name	
fund ABN	
trustee 1 name	
trustee 2 name	
trustee 3 name	
trustee 4 name	

2. Contact details (must be completed)

contact name	
postal address	
suburb	state postcode
country	
phone (after hours)	phone (business hours)
mobile	fax
email	

7. Declaration and applicant signature(s) (must be completed)

I/We have read and understood the Product Disclosure Statement (PDS) for Perpetual's Pooled Super Trust and I/we:

- agree to be bound by the provisions of the Trust Deed and any other superannuation restrictions contained in the PDS and 'Additional information' document
- declare that the applicant's fund is eligible to invest in Perpetual's Pooled Super Trust under the provisions of the Superannuation Industry (Supervision) Act 1993 (SIS)
- declare that investment in Perpetual's Pooled Super Trust is permitted by the governing rules of the applicant's fund
- declare that I/we will advise Perpetual immediately if the fund ceases to be a complying fund under the provisions of SIS
- acknowledge that Perpetual will hold personal information about me/us and will disclose this information to my/our financial adviser (named in this form) in relation to the investment described in this form. I/We acknowledge that Perpetual will cease to disclose this personal information if I/we notify Perpetual that the financial adviser named in this form no longer acts on my/our behalf
- acknowledge that neither the Trustee nor any other company in the Perpetual Group guarantees the repayment of capital or the performance of the PST or any investment option
- agree to receive ongoing investor information including PDS and incorporated information, confirmations of transactions and additional information as applicable, that can be sent to an email address that I/we provide to you (and/or through the Perpetual website).

signature	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	COMPANY SEAL (if applicable)
capacity	<input type="checkbox"/> sole director <input type="checkbox"/> director <input type="checkbox"/> secretary (company trustees only)			
signature	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
full name	<input type="text"/>			
capacity	<input type="checkbox"/> director <input type="checkbox"/> secretary (company trustees only)			
signature	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	

Lodging your application form

Please forward your completed form and cheque to your financial adviser. Alternatively, you can post the form and cheque to the address below (no stamp required if posted in Australia).

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Perpetual's Pooled Super Trust
GPO Box 4171
Sydney NSW 2001

