

Perpetual Select Super Plan

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458 Perpetual's Select Superannuation Fund ABN 51 068 260 563 RSE R1057034

Application for Additional Investment and Features Form

Please complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS. Mark appropriate boxes with a cross like the following X. Start at the left of each answer space and leave a gap between words.

1. Investor details (must be completed)

member number		П			Τ	I								
member name														
contact numbers*	phone	П	Т	Т	П		Г	П	mobile					
email address*	TT													

^{*} If you provide these details we will update our records accordingly

2. Payment details (must be completed)

How will the contribution be made? NOTE: Cash is not accepted.

by direct debit	we will debit your bank account nominated in section 5 as bank account 1. I acknowledge and accept the terms and conditions of direct debit as explained in the Direct Debit Request Service Agreement which is available from www.perpetual.com.au/select-super-updates.	
by rollover	make sure you complete and send a 'Transfer authority' form to your current superannuation provider.	

3. Contribution/rollover details

Please indicate below the amount of your contributions and/or rollover.

Contribution limits: Please refer to the 'Your Super Plan account' document for information about contribution limits. You should speak to your financial adviser about these limits when considering your situation. Contributions made in excess of the limits will attract additional tax.

Initial one-off contributions

Contribution type	Amount	Further details
personal contribution	\$	If you are eligible and intend to claim a tax deduction on these contributions you will also need to complete section 5.
spouse contribution	\$	
downsizer contribution	\$	You will also need to complete a 'Downsizer contribution into superannuation' form (available from the ATO).
CGT contribution	\$	You will also need to include a completed CGT cap election form (available from the ATO).
personal injury payment	\$	You will also need to include a completed contribution for personal injury form (available from the ATO).
COVID-19 re-contribution	\$	You will also need to include a completed Notice of re-contribution of COVID-19 Early Release amounts form (available from the ATO)
Total	\$	

3. Contribution/rollover details (continued)

Rollovers

If you are transferring from another super fund please provide the below details. You will also need to complete the 'Transfer authority' form for each rollover being requested.

Name of the previous institution	Policy /Account number	Approximate amount
		\$
		\$
		\$
		\$
		\$
	Total	\$

Savings plan

Only complete this section if you would like to establish a savings plan to make regular contributions from a nominated bank account. You will also need to nominate a bank account in section 5, from which contributions will be deducted under the savings plan.

Contribution type If you are eligible and intend to claim a tax deduction on your Personal Contributions you will need to complete section 4.	personal spouse	
Amount	\$	
Frequency	monthly (default) quarterly	

4. Tax deduction for personal contributions

Tax deduction for your personal contributions (including one-off and savings plan contributions)

I am eligible and intend to clain	n a tax deduction for my personal contributions of:
\$	one-off contribution)
This is your notice to us, to be	effective from the later of the date of this application or the date that you become a member of the

This is your notice to us, to be effective from the later of the date of this application or the date that you become a member of the Super Plan, of the amount you intend to claim as a tax deduction in relation to Section 290-170 of the Income Tax Assessment Act 1997. We will deduct 15% contributions tax from this amount. This notice will be applicable for the current and future financial years (for contributions made under the savings plan) unless you notify us in writing of your intention to vary this notice. We will send you an acknowledgement of the amount you wish to claim as a tax deduction which you will need to retain for tax purposes for the current and future financial years (for contributions made under the savings plan).

5. Bank account details (if applicable)

By providing your bank account details in this section, you authorise us to use these details for all future transaction requests that you nominate.

Bank account 1														
Complete your bank account de	tails in this section ar	nd indicate w	hat yo	u would	l like ι	ıs to ı	use th	nese	bank	acco	ount (deta	ils fo	or
applications														
savings plan														
withdrawals														
financial institution														
					Ш		Ш					┙	┙	Ш
branch								۰						
					Ш		Ш						┙	ш
BSB ac	ccount number													
account name														
					Ш									
signature of account holder A			signature of account holder B											
date / /														
I request and authorise Perpetual	Investment Managem	ent Limited,	Debit L	lser Ider	ntificat	ion N	umbe	er 26	3347 1	to arı	ange	e for	any	
amount Perpetual Investment Mar	-	-	_				_							_
System from an account held at t				-					iaition	s of	ine L	ırec	t De	JIQ

Request Service Agreement which is available from www.perpetual.com.au/select-super-updates.

6. Features (must be completed)

Indicate which optional features you would like applied to	Frequency (if applicable)					
Auto-rebalancing If no frequency is selected, quarterly will be assumed	yes		quarterly (default) half-yearly yearly			
BPAY (additional investments)	yes (default)		n/a			
Adviser Online Account Access Note: your adviser can access information about your account online	view & transact (default) view only		n/a			
For each ontional feature you have elected inlease ensure	you have read and understo	od the	relevant			

section in the 'Your Super Plan account' document available on our website for that optional facility.

7. Investment details

The way you initially allocate your money across investment options becomes your investment strategy. All future contributions will be allocated according to your investment strategy.

Investment options	Short code	Investment strategy
Conservative	SSCOST	%
Diversified	SSDVST	%
Balanced	SSBAST	%
Growth	SSGRST	%
High Growth	SSEQST	%
Cash	SSCAST	%
Australian Share	SSAEST	%
International Share	SSINST	%
	Total	100%

8. Declaration and signature (must be completed)

I declare and agree that:

- I have read and understood the Product Disclosure Statement (PDS) and any relevant incorporated material for Select Super Plan and confirm I accept this offer in Australia
- all of the information provided in my application is true and correct
- If I have received the PDS from the internet or other electronic means that I received it personally or a print out of it, accompanied by or attached to this application form
- I have read, understood and agree to be bound by, any additional restrictions in the PDS and any incorporated material and I agree to be bound by the provisions of the Trust Deed (as amended from time to time)
- If applicable, in the case of contributions, that I have read and understood the contribution eligibility rules in the PDS and that I am eligible to make or have contributions made for my benefit and will notify the Trustee if I am no longer eligible
- If I am claiming a personal tax deduction in relation to my contributions
 - I intend to claim the personal contributions stated as a tax deduction
 - I am a current member of Select Super Plan
 - Select Super Plan currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part of these contributions
 - I have not included any of the contributions in an earlier valid notice.
- I declare that I am lodging this notice at the earlier of either:
 - before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, or
 - before the end of the income year following the year in which the contribution was made.
- I authorise the Trustee to quote my TFN or exemption to the Australian Taxation Office (ATO).
- I authorise the Trustee to obtain information from the ATO regarding my superannuation account in relation to my TFN, PAYG or other superannuation tax-related matters.
- I acknowledge that neither the Trustee, Perpetual Trustee Company Limited, nor any of their related entities, guarantees the repayment of capital or the performance of the Super Plan.
- If investing under the Savings Plan, I have read the Direct Debit Request Service Agreement and have completed sections 3 and 5.

8. Declaration and signature (must be completed) (continued)

- I acknowledge that:
 - I have read and understand the privacy disclosure as detailed in the PDS. I consent to my personal information being collected, held, used and disclosed in accordance with the privacy disclosure
 - The Trustee is required to provide information to the ATO regarding any superannuation account
 - The Trustee will hold personal information about me and will disclose this information to my financial adviser in relation to the
 investments described in this form. Where there is any change to this authority or relating to my financial adviser, I will notify
 the Trustee of the change
 - neither the Trustee, Perpetual Trustee Company Limited, nor any of their related entities, guarantees the repayment of capital
 or the performance of the Select Super Plan or any investment option.

signature of member									dat	e	/		/			
			т			7		7	т	т				۳	T	
print name												ш		ш		ш

Important notes:

- If signing under power of attorney, the attorney certifies
 that he or she has not received notice of revocation of
 that power. The power of attorney, or a certified copy,
 must be sent to us, if not previously provided.
- We have the absolute discretion to accept or reject any application.
- A business day is a working day for us in Sydney.

Final checklist

Have you:

- Completed all sections of your application form?
- · Signed your application form?

Please send your completed application form to:

Perpetual Select Super and Pension Reply Paid 95150 PO Box 616 Parramatta NSW 2124

or email selectsuperandpension@perpetual.com.au