



3. Services provided for the above fee

Services must relate to personal financial advice provided in relation to your Super or Pension account.

Please outline or attach the services that the account holder is entitled to receive for the fixed term adviser service fee. These must fall within the range of services listed below. Please indicate below if using an attachment.

Advisers are able to charge adviser service fees for the following services provided in relation to your WealthFocus Super or WealthFocus Pension account:

- account establishment and commencement
  - periodic review of your account
  - strategic superannuation advice
  - management and administration of your account
- superannuation investment portfolio advice
  - superannuation contribution strategy
  - insurance in superannuation strategy
  - superannuation withdrawal advice and management

We can refuse a request to pay adviser service fees under a fixed term fee arrangement.

## 4. Financial adviser acknowledgement

- I will promptly notify the Trustee in writing if I am no longer entitled to receive the adviser service fee.
- I consent to the Trustee acting as my agent to collect any adviser service fee agreed in the 'Fixed term adviser service fee' section of this application form.
- I confirm that the services to be provided to the account holder for the fixed term fee arrangement fall within the range of services listed, for which advisers are able to charge adviser service fees.

<b>signature of adviser</b>	
<div></div>	date <div>DD</div> / <div>MM</div> / <div>YYYY</div>
print name	
<div></div>	

## 5. Declaration and investor signature(s) (must be completed)

I acknowledge and agree that:

- The fixed term adviser service fee specified in the 'Fixed term adviser service fee' section of this form will be deducted for a maximum of 12 months from when the fixed term adviser service fees commences. Consent may be withdrawn (terminating the fixed term adviser service fees arrangement) or varied at the time during the fixed term adviser service fees arrangement by notice in writing to my financial adviser or the Trustee
- The fixed term adviser service fees arrangement may continue where the Trustee is advised by the outgoing AFS licensee or financial adviser that the services under the fixed term adviser service fee arrangement are to be provided by a new AFS licensee or financial adviser and that I have consented to that transfer
- By consenting to the above adviser service fee, my account balance and potential future returns will reduce
- The Trustee may in its absolute discretion decline to pay the adviser service fee and I understand that it may be an offence, including an early release of superannuation scheme, if the details and confirmations in this form are not true and correct.

<b>signature of investor</b>	
<div></div>	date <div>DD</div> / <div>MM</div> / <div>YYYY</div>
print name	
<div></div>	

\* Please include the power of attorney (or a certified copy) with this form if it has not previously been provided to us.

### Important notes

- Please read the relevant PDS before completing the form.  
Advice fees are referred to as adviser service fees in the PDS.
- If you have any questions about this form, or your account, please call us on 1800 011 022 during business hours (Sydney time), visit [www.perpetual.com.au](http://www.perpetual.com.au) or email [superandpension@perpetual.com.au](mailto:superandpension@perpetual.com.au)

Please send the completed form to:

**Reply Paid 92151,  
Perpetual WealthFocus Super and Pension  
PO Box 617, Parramatta NSW 2124**

or email: [superandpension@perpetual.com.au](mailto:superandpension@perpetual.com.au)

No stamp required if posted in Australia.