

## Switch form

Please complete this form in black ink using **BLOCK** letters.

This form must be completed when switching between Funds in Perpetual WealthFocus Investment Funds.

### 1. Investor details (must be completed)

client number	<input type="text"/>	account number	<input type="text"/>
account name	<input type="text"/>		
contact number*	<input type="text"/>		
email address*	<input type="text"/>		

\* If you provide your contact number and email address we will update our records accordingly.

### 2. Investment strategies for future investments

Please update my investment strategy to reflect my portfolio following the below switch. The investment strategy is used for future additional investments, saving plan investments, auto-rebalancing and regular withdrawal plan (where applicable). If no selection is made, 'yes' will be assumed.

yes
  no

### 3. Distribution preference for switch to options

If no selection is made, 'reinvest' will be assumed.

reinvest
  pay to bank account

### 4. Switch details

Switch from		Switch to	
name of investment option	\$ or %	name of investment option	\$ or %
WealthFocus Perpetual Diversified Income Fund	<input type="text"/>	WealthFocus Perpetual Diversified Income Fund	<input type="text"/>
WealthFocus Perpetual Industrial Share Fund	<input type="text"/>	WealthFocus Perpetual Industrial Share Fund	<input type="text"/>
WealthFocus Barrow Hanley Global Share Fund	<input type="text"/>	WealthFocus Barrow Hanley Global Share Fund	<input type="text"/>
<b>Total</b>	<input type="text"/>	<b>Total</b>	<input type="text"/>

The minimum switch amount is \$1000. Please note a minimum balance of \$1,000 in an investment option is required after any partial switch from that investment option. If the amount you have requested to switch leaves the value of that investment option below \$1,000 we will process the switch for 100% of the units in that investment option.

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

I/We have received and read the current Perpetual WealthFocus Investment Funds Product Disclosure Statement (PDS) and agree to be bound by the provisions of the Funds' constitutions and any other additional restrictions contained in the PDS.

I/We acknowledge that switching from one Fund to another could realise a gain which may have tax implications.

Signature of investor 1 or company officer	Signature of investor 2 or company officer
<input type="text"/>	<input type="text"/>
print name	print name
<input type="text"/>	<input type="text"/>
capacity (company investments only)	capacity (company investments only)
<input type="checkbox"/> sole director <input type="checkbox"/> director <input type="checkbox"/> secretary	<input type="checkbox"/> director <input type="checkbox"/> secretary
date	date
<input type="text"/>	<input type="text"/>

### Important notes

- Please read the Perpetual WealthFocus Investment Funds PDS (including but not limited to the Feature Book and Investment Book) before completing the Switch form. Investors should retain the PDS for making switches during the life of the PDS.
- In relation to trust investors, only the trustee has rights and obligations under a Fund.
- Joint applicants will be assumed to be joint tenants unless otherwise specified.
- If signed under power of attorney, the attorney certifies that he or she has not received notice of revocation of the power of attorney. Please include the power of attorney (or a certified copy) with this form if it has not previously been provided to Perpetual.
- Perpetual has an absolute discretion to accept or reject any application.
- For information, please call Perpetual's Investor Service Centre on 1800 022 033 during business hours (Sydney time), visit [www.perpetual.com.au](http://www.perpetual.com.au) or email [investments@perpetual.com.au](mailto:investments@perpetual.com.au)

Please forward your completed form to your financial adviser or post to the address below. No stamp required if posted in Australia.

**Reply Paid 4171, Perpetual Investments, GPO Box 4171, Sydney, NSW 2001, Australia, or fax to 02 8256 1427.**