



**For Perpetual: WealthFocus Investment Advantage (incl. Wholesale),
WealthFocus Investment Funds, Wholesale Funds, Select Investment
Funds, Cash Management Fund, Monthly Income Fund, Term Fund
and Pooled Super Trust**

Perpetual Investment Management Limited ABN 18 000 866 535 AFSL 234426
Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315 RSE R1057027

CHANGE OF INSTRUCTIONS FORM

Please complete this form in black ink using BLOCK letters.

1. Applicant (must be completed)

client number	<input type="text"/>	account number	<input type="text"/>
account name	<input type="text"/>		

2. Change of investor details

A. Individual and joint account holders

Investor 1 (individual account holder)

title
Mr Mrs Miss Ms other

first name(s)

last name

occupation

date of birth / / gender male female

Residency status for tax purposes
Tax residency rules differ by country. Whether an individual is a tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the United States, tax residency can also be as a result of citizenship or residency.

Please answer BOTH of the following tax residency questions:

1. Are you a tax resident of Australia?
yes (complete the following details and then proceed to question 2 below) no (proceed to question 2 below)

tax file number (TFN)
 or

TFN exemption code

Investor 2 (joint account holder)

title
Mr Mrs Miss Ms other

first name(s)

last name

occupation

date of birth / / gender male female

Residency status for tax purposes
Tax residency rules differ by country. Whether an individual is a tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the United States, tax residency can also be as a result of citizenship or residency.

Please answer BOTH of the following tax residency questions:

1. Are you a tax resident of Australia?
yes (complete the following details and then proceed to question 2 below) no (proceed to question 2 below)

tax file number (TFN)
 or

TFN exemption code

2. Change of investor details (continued)

A. Individual and joint account holders

Investor 1 (individual account holder)

2. Are you a tax resident of another country?

yes (complete the following details) no

If 'yes', please list all relevant countries and provide your tax identification number (TIN) for each country.
A TIN refers to the number assigned by a country for the purpose of administering its tax laws and is the equivalent of a TFN in Australia. If a TIN is not provided, please list one of the three reasons specified below (A, B or C) for not providing a TIN.

Country 1

TIN If no TIN, list reason A, B or C

Country 2

TIN If no TIN, list reason A, B or C

If there are more than two countries, provide details on a separate sheet and tick this box.

Reason A: The country of tax residency does not issue TINs to tax residents.

Reason B: I have not been issued with a TIN.

Reason C: The country of tax residency does not mandate provision of the TIN.

Residential address (mandatory)

unit number street number

street name

suburb

state postcode

country

phone (business hours)

phone (after hours)

mobile

email address

Provide your email address and we will provide you with email notification of new account correspondence as it becomes available.

Investor 2 (joint account holder)

2. Are you a tax resident of another country?

yes (complete the following details) no

If 'yes', please list all relevant countries and provide your tax identification number (TIN) for each country.
A TIN refers to the number assigned by a country for the purpose of administering its tax laws and is the equivalent of a TFN in Australia. If a TIN is not provided, please list one of the three reasons specified below (A, B or C) for not providing a TIN.

Country 1

TIN If no TIN, list reason A, B or C

Country 2

TIN If no TIN, list reason A, B or C

If there are more than two countries, provide details on a separate sheet and tick this box.

Reason A: The country of tax residency does not issue TINs to tax residents.

Reason B: I have not been issued with a TIN.

Reason C: The country of tax residency does not mandate provision of the TIN.

Residential address (mandatory)

unit number street number

street name

suburb

state postcode

country

phone (business hours)

phone (after hours)

mobile

email address

Provide your email address and we will provide you with email notification of new account correspondence as it becomes available.

2. Change of investor details (continued)

A. Individual and joint account holders – Postal address (optional)

Investor 1 (individual account holder)

po box	unit number	street number
<input type="text"/>	<input type="text"/>	<input type="text"/>
street name		
<input type="text"/>		
suburb		
<input type="text"/>		
state	postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>
country		
<input type="text"/>		

Investor 2 (joint account holder)

po box	unit number	street number
<input type="text"/>	<input type="text"/>	<input type="text"/>
street name		
<input type="text"/>		
suburb		
<input type="text"/>		
state	postcode	
<input type="text"/>	<input type="text"/>	<input type="text"/>
country		
<input type="text"/>		

B. All other account holders

company name		
<input type="text"/>		
name of superannuation fund, trust, partnership, association, government body or co-operative		
<input type="text"/>		
c/-		
<input type="text"/>		
po box	unit number	street number
<input type="text"/>	<input type="text"/>	<input type="text"/>
street name		
<input type="text"/>		
suburb		
<input type="text"/>		
state	postcode	country
<input type="text"/>	<input type="text"/>	<input type="text"/>
phone (business hours)	mobile	fax
<input type="text"/>	<input type="text"/>	<input type="text"/>
email address		
<input type="text"/>		

Provide your email address and we will provide you with email notification of new account correspondence as it becomes available.

3. Change of authorised representative appointment

I/We have read and agree to the conditions applying to the appointment of an authorised representative as set out in the relevant Product Disclosure Statement.

Online Account Access for my authorised representative

view and transact (default) or view only or no access

authorised representative details:

first name(s)
 last name
 po box unit number street number
 street name
 suburb
 state postcode country
 signature of authorised representative date / /

4. Change of account details

You can only nominate a bank account that is held in your name(s). By providing your bank account details in this section, you accept the terms in the Direct Debit Service Agreement and authorise Perpetual to use these details for all future transaction requests that you nominate.

Bank account 1	Bank account 2
Complete your bank account details in this section and indicate what you would like us to use these bank account details for	Only complete your account details in this section if you would like us to debit a different bank account for your savings plan .
<input type="checkbox"/> applications <input type="checkbox"/> withdrawals <input type="checkbox"/> distribution payments	
name of financial institution <input type="text"/>	name of financial institution <input type="text"/>
branch name <input type="text"/>	branch name <input type="text"/>
branch number (BSB) <input type="text"/> - <input type="text"/> account number <input type="text"/>	branch number (BSB) <input type="text"/> - <input type="text"/> account number <input type="text"/>
name of account holder <input type="text"/>	name of account holder <input type="text"/>
signature of account holder A <input type="text"/>	signature of account holder A <input type="text"/>
signature of account holder B <input type="text"/>	signature of account holder B <input type="text"/>
date <input type="text"/> / <input type="text"/> / <input type="text"/>	date <input type="text"/> / <input type="text"/> / <input type="text"/>

5. Change of distribution details

Reinvest distributions for all my funds in this account.


Pay all distributions to my bank account as specified in Section 4.

- If you wish to reinvest your distributions for specific investment funds within your account, please contact Perpetual's Investor Centre on 1800 022 033.
- Distributions can not be reinvested for the Monthly Income Fund and Term Fund.

6. Change of financial adviser

Complete this section if you are changing your financial adviser.

I/We have a new financial adviser whose details appear below. I/We acknowledge that Perpetual will hold personal information about me/us and will disclose this information to my/our financial adviser. I/We acknowledge that Perpetual will cease to disclose this personal information if I/we notify Perpetual that the financial adviser whose details appear below no longer acts on my/our behalf.

name of financial adviser															
postal address															
suburb						state			postcode						
phone (business hours)						phone (mobile)									
email															
Perpetual adviser number						or									
(a) dealer group						and									
(b) dealer branch location*															
	*City or suburb of the dealer group office you operate through														
financial adviser signature						date									

7. Investor signature(s)

- Please sign this form where indicated below. This form must be signed as per the current signing instructions we have on record. If no amendments have been made, the current signatories for the account are the individuals who signed the initial investment application form.
- 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.
- For information, please call Perpetual's Investor Service Centre on **1800 022 033** during business hours (Sydney time), visit www.perpetual.com.au or email investments@perpetual.com.au

<p>signature of investor 1 or company officer</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>print name</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>title</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>date</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>	<p>signature of investor 2 or company officer</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>print name</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>title</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>date</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>
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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

Investment Link information

IL GN / / (Group)

IL AN / / (Adviser)

IL CN / / (Client)