



**For Perpetual: WealthFocus Investment Advantage, WealthFocus Investment Funds, Wholesale Funds, Wholesale International Share Fund, Pure Series Funds, Pure Credit Alpha, Select Investment Funds, Cash Management 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

#### 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

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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 require the TIN to be disclosed.

Residential address (mandatory)

unit number street number

street name

suburb (if relevant) or city

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 require the TIN to be disclosed.

Residential address (mandatory)

unit number street number

street name

suburb (if relevant) or city

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"/>	
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"/>	
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. Features

Existing investors in the Fund need only complete this section if you wish to add any new features or change existing features.

**Indicate which optional features you would like applied to your account.**

<b>BPAY</b> for additional investments (not available for Wholesale International Share Fund)	yes	<input type="checkbox"/>
<b>Investor Online Account Access</b>	view & transact (default)	<input type="checkbox"/>
	view only	<input type="checkbox"/>
<b>Adviser Online Account Access</b>	view & transact (default)	<input type="checkbox"/>
Note: your adviser can access information about your account online	view only	<input type="checkbox"/>

For each optional feature you have selected, please ensure you have read and understood the relevant section in the PDS for your optional feature.

## 4. 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

email address

signature of authorised representative

date  /  /

## 5. 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

Complete your bank account details in this section and indicate what you would like us to use these bank account details for

applications
  withdrawals
  distribution payments

name of financial institution

branch name

branch number (BSB)

account number

name of account holder

signature of account holder A

signature of account holder B

date

### Bank account 2

**Only** complete your account details in this section if you would like us to debit a **different** bank account for your **savings plan**.

name of financial institution

branch name

branch number (BSB)

account number

name of account holder

signature of account holder A

signature of account holder B

date

## 6. Change of distribution details

Reinvest distributions for all my funds in this account.

Pay all distributions to my bank account as specified in Section 5.

- If you wish to reinvest your distributions for specific investment funds within your account, please contact Perpetual's Investor Centre on 1800 022 033.

## 7. 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			/			/								

**ADVISER  
STAMP**

## 8. 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](http://www.perpetual.com.au) or email [investments@perpetual.com.au](mailto:investments@perpetual.com.au)

signature of investor 1 or company officer	signature of investor 2 or company officer
print name	print name
title	title
date	date

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)