Perpetual

Perpetual WealthFocus Investment Advantage

Perpetual Investment Management Limited ABN 18 000 866 535 AFSL 234426

SWITCH FORM

Please complete this form in black ink using BLOCK letters.

Please note that this form can only be used when switching between investment options in Perpetual WealthFocus Investment Advantage.

1. Investor details (must be completed)

client number		account number	
name			
contact number			

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, dollar cost averaging plan and regular withdrawal plan (where applicable). If no selection is made, 'yes' will be assumed.

☐ yes ☐ no

If you switch (fully or partially) or fully withdraw from an investment option, your investment strategy will be updated automatically to reflect your investment portfolio following the switch/withdrawal unless you request otherwise at the time. Any other transactions will not result in changes to your investment strategy unless you also request a change to it at the time.

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 %
Total		**Total**	

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 read the current relevant Perpetual WealhtFocus Product Disclosure Statement (PDS) and agree to be bound by the provisions of the Fund's constitution and any other additional restriction contained in the PDS.

Signature of investor 1 or company officer	Signature of investor 2 or company officer
print name	print name
capacity (company investments only)	capacity (company investments only)
☐ sole director ☐ director ☐ secretary	☐ director ☐ secretary
date	date

Important notes

- Please read the relevant Perpetual WealthFocus PDS (including but not limited to the Features 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 the Fund.
- Joint applicants will be assumed to be joint tenants unless otherwise specified.
- If signed under power of attorney, the attorney certified 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 or email investments@perpetual.com.au

Forward your completed form to:
Reply Paid 4171
Perpetual WealthFocus Investments
GPO Box 4171
Sydney NSW 2001

Alternatively, you can send us a copy by email or fax:
Email: investments@perpetual.com.au
Fax: 02 8256 1427

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