



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

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.

There may be circumstances where we consider that processing a switch will not be consistent with our duties as responsible entity of the Fund, such as where we consider that processing the switch is not in the best interests of investors as a whole. In these cases, we may exercise our right to reject and not process your switch request. If this occurs, we will notify you.

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

I/We have read the current relevant Perpetual WealthFocus 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
<input type="text"/>	<input type="text"/>
print name	print name
<input type="text"/>	<input type="text"/>
<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"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

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 Client Services 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:

Email: investments@perpetual.com.au