Perpetual

Perpetual WealthFocus Super and Pension Plan

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual WealthFocus Superannuation Fund ABN 41 772 007 500 RSE R1057010

CHANGE OF INSTRUCTIONS FORM

Please ensure you complete the 'Member details' and 'Member signature' sections in addition to the sections where you require a change to the instructions we hold on record.

Please complete all pages of this form in BLACK INK using BLOCK letters.

Member details (must be completed)

client number

investor name

Tick relevant boxes. I wish to change my instructions for: ☐ All of my investments under this client number **or**

☐ My investment in the Perpetual WealthFocus Super Plan

☐ My investment in the Perpetual WealthFocus Term Allocated Pension

☐ My investment in the Perpetual WealthFocus Account Based Pension

Please select the details you would like to update and complete the corresponding sections:

☐ Contact details – section 1

☐ Tax file number– section 2

☐ Change of banking instructions – section 3

☐ Pension payment details – section 4

☐ Change of authorised representative appointment – section 5

☐ Change of member advice fee – section 6

☐ Change of financial adviser – section 7

1. Contact details

c/- (if applicable)

postal address

suburb state postcode

country

phone (after hours) phone (business hours)

mobile fax

email address

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

2. Tax file number (TFN)

We are authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993. It is not an offence not to quote your TFN, but if you have not previously provided your TFN and you do not quote it now, we are not permitted to accept the contribution(s) covered by this notice. If you provide your TFN, we'll provide your TFN to the trustee of another superannuation fund or retirement savings account provider receiving your transferred benefits now or in the future, unless you ask us not to in writing. An exemption is not considered to be a TFN.

tax file number

3. Change of banking instructions

Must be an Australian bank, building society or credit union account.

use this account for ☐ withdrawals ☐ savings plan direct debits (Super Plan only) ☐ future payments

financial institution

branch

BSB – account number

account name

4. Pension payment details

Please note that changes are effective 5 business days after all documents have been received.

I would like to change my pension payment day to the:

☐ 6th ☐ 13th ☐ 20th ☐ 27th day of the month

Please choose only one date and specify month – subject to all documents being received 5 business days in advance.

I would like to receive my pension payments: ☐ twice monthly ☐ monthly ☐ quarterly ☐ half-yearly ☐ annually

Account Based Pension Only

Pension payment amount ☐ minimum

or an amount (before tax) of: $ pa or $ per payment

Term Allocated Pension Only

☐ 'Standard' amount

☐ less than 'Standard' amount (maximum 10%) %

☐ more than 'Standard' amount (maximum 10%) %

Pension payment drawdown

	Investment options	**%**
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

5. Change of authorised representative appointment

I have read the Conditions of Appointment of an Authorised Representative set out in the relevant Product Disclosure Statement, and agree to the Conditions therein.

Company applicants may execute this appointment in accordance with its constitution or under Power of Attorney.

name of authorised representative

Postal address of authorised representative

c/- (if applicable)

po box | unit number | street number

street name

suburb

state | postcode | country

signature of authorised representative

date / /

6. Change of member advice fee

Complete this section if you have agreed with your financial adviser to have an ongoing and/or one-off member advice fee deducted. In collecting this fee Perpetual acts as an agent for your financial adviser.

ongoing fee (including GST less any RITC available to the Fund)

% per annum or $ per month

The ongoing member advice fee is to be paid:

as a deduction pro rata across my investment portfolio (default) **or**

from my investment option.

one off fee (including GST less any RITC available to the Fund)

$

The one off member advice fee is to be paid:

as a deduction pro rata across my investment portfolio (default) **or**

from my investment option.

For an adviser to receive a net (after GST) fee of a specified amount, multiply this amount by 1.025 to determine the amount that should be entered on the application form. For example, for an adviser to receive a net fee of $1,000, the amount entered on the application form should be $1,025.

We can refuse a request to pay a member advice fee.

7. Change of financial adviser

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

Financial adviser details and member advice fee

I consent to Perpetual acting as my agent to collect any member advice fee.

Where an ongoing member advice fee has been agreed with the member, I will promptly notify Perpetual if the member advice fee is terminated by the member or under the fee disclosure or opt in requirements of Division 3 of Part 7.7A of the Corporations Act (Future of Financial Advice).

financial adviser name			
phone (after hours)		phone (business hours)	
mobile		fax	
AFSL licensee name		AFSL number	
Perpetual adviser number			
dealer group		dealer branch	
email address			
financial adviser signature		date / /	ADVISER STAMP

IL GN / / (Group)

IL AN / / (Adviser)

IL CN / / (Client)

Member signature (must be completed)

signature		date / /	
print name			

Important notes:

Please ensure that you sign the form above where indicated. Ensure that the form is signed as per the current signing instructions we have on record. If no amendments have been made, the current signatory for the account is the individual 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. The Power of Attorney or a certified copy must be sent to Perpetual if not previously provided. For enquiries or a copy of a current Product Disclosure Statement, call Perpetual on 1800 022 033 during business hours (Sydney time).

Forward your completed form to your financial adviser or post the form to: **Reply Paid 4171, Perpetual WealthFocus Super Plan and Pension Plan, GPO Box 4171, Sydney NSW 2001, Australia.** No stamp required if posted in Australia.

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