

# PERPETUAL'S POOLED SUPER TRUST

Applying for an investment

## APPLYING FOR AN INVESTMENT

### GENERAL REQUIREMENTS

Please note:

- you should read the PDS before applying for an investment
- the applicant must be the trustee of a complying superannuation entity
- investment amounts need not be in whole dollars
- there is no maximum investment amount
- cash amounts are not accepted, however we can determine other acceptable methods of payment
- the PST doesn't accept investments that represent segregated current pension assets
- for trust investors, only the trustee has rights and obligations under the PST
- 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 us
- we have absolute discretion to accept, reject or limit any application.

### AUTHORISED SIGNATORIES

If no amendments have been made, the authorised signatories to your investment are the individuals (including directors/secretary of a corporate trustee) or attorney who signed the initial investment application form.

You can add authorised signatories or change the authorised signatories by written request signed by all existing authorised signatories and all new authorised signatories.

### INITIAL INVESTMENTS

Your initial investment in the PST must be at least \$100,000. The minimum initial investment in any investment option is \$50,000.

To invest in the PST, you should complete the application form and send to us, together with a cheque for your initial investment amount made payable to 'PIML – PST – [insert name of applicant(s)]'.

You must also complete an application form when you invest in a particular investment option for the first time, even if you already hold units in another investment option.

## ADDITIONAL INVESTMENTS

If you are already invested in an investment option, you can make an additional investment in that particular investment option via BPAY (minimum \$2,000 in any investment option) – simply remit your additional investment to us quoting your **Customer Reference Number (CRN)** and the **BPAY biller code** for your relevant existing investment option as detailed in the following table.

### BPAY BILLER CODES

INVESTMENT OPTION	BPAY BILLER CODE
Industrial Share	989442
Global Share	989467
Balanced Growth	989491

## LODGING YOUR APPLICATION FORM

You can lodge your completed application form (including your cheque) with your financial adviser or at our Sydney office or post (no stamp required if posted in Australia) to:

Reply Paid 4171  
Perpetual's Pooled Super Trust  
GPO Box 4171  
Sydney NSW 2001

Perpetual 

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# Perpetual's Pooled Super Trust

Product Disclosure Statement issue number 8 dated 1 March 2019

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315

## APPLICATION FORM

Please complete all pages of this form in black ink using BLOCK letters.

If you are a current investor in the PST, please complete:

client number		please add to my/our existing account number
account number		please create a new account number for this investment

If you are a current investor in the PST and no selection is made, we will add your investment to your existing account number.

### 1. Investor details (must be completed)

fund name	
fund ABN	
trustee 1 name	
trustee 2 name	
trustee 3 name	
trustee 4 name	

### 2. Contact details (must be completed)

contact name	
postal address	
suburb	state      postcode
country	
phone (after hours)	phone (business hours)
mobile	fax
email	

### 3. Withdrawal account details

These account details are for the account into which you would like withdrawals paid. **Must be an Australian bank, building society or credit union account.**

financial institution	
branch	
account name	
branch number (BSB)	account number

#### 4. Investment information (must be completed)

The total minimum initial investment in the PST is \$100,000. The minimum initial investment in any investment option is \$50,000. The initial investment must be made by cheque. Please make cheques payable to 'PIML – PST – [insert name(s) of applicant(s)]'.

Investment option	APIR code	amount
Industrial Share	PER0058AU	\$
Global Share	PER0059AU	\$
Balanced Growth	PER0061AU	\$
<b>Total</b>		\$

#### 5. Features

Indicate which features you would like applied to your account


<b>BPAY</b> for additional investments	yes	<input type="checkbox"/>	
<b>Investor Online Account Access</b>	yes (default)	<input type="checkbox"/>	no <input type="checkbox"/>
<b>Adviser Online Account Access</b> Note: your adviser can access information about your account online	yes (default)	<input type="checkbox"/>	no <input type="checkbox"/>
<b>Marketing material</b> I/We would like to be informed about Perpetual's products, services and offers	yes (default)	<input type="checkbox"/>	no <input type="checkbox"/>

For each optional feature you have selected, please ensure you have read and understood the relevant section in the PDS and/or 'Additional information' document for that optional feature.

#### 6. Authorised representative appointment (optional)

I/We have read, and agree to, the conditions applying to the appointment of an authorised representative in the 'Additional information' document.

(Company applicants may execute this appointment in accordance with their constitution or under power of attorney).

<b>Online Account Access for my authorised representative</b>	yes (default)	<input type="checkbox"/>	no	<input type="checkbox"/>
<b>Authorised representative details</b>				
first name(s)	<input type="text"/>			
last name	<input type="text"/>			
signature of authorised representative	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
signature of applicant(s)	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	

## 7. Declaration and applicant signature(s) (must be completed)

I/We have read and understood the Product Disclosure Statement (PDS) for Perpetual's Pooled Super Trust and I/we:

- agree to be bound by the provisions of the Trust Deed and any other superannuation restrictions contained in the PDS and 'Additional information' document
- declare that the applicant's fund is eligible to invest in Perpetual's Pooled Super Trust under the provisions of the Superannuation Industry (Supervision) Act 1993 (SIS)
- declare that investment in Perpetual's Pooled Super Trust is permitted by the governing rules of the applicant's fund
- declare that I/we will advise Perpetual immediately if the fund ceases to be a complying fund under the provisions of SIS
- acknowledge that Perpetual will hold personal information about me/us and will disclose this information to my/our financial adviser (named in this form) in relation to the investment described in this form. I/We acknowledge that Perpetual will cease to disclose this personal information if I/we notify Perpetual that the financial adviser named in this form no longer acts on my/our behalf
- acknowledge that neither the Trustee nor any other company in the Perpetual Group guarantees the repayment of capital or the performance of the PST or any investment option
- agree to receive ongoing investor information including PDS and incorporated information, confirmations of transactions and additional information as applicable, that can be sent to an email address that I/we provide to you (and/or through the Perpetual website).

signature	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	<b>COMPANY SEAL</b> (if applicable)
capacity	<input type="checkbox"/> sole director <input type="checkbox"/> director <input type="checkbox"/> secretary (company trustees only)			
signature	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	
full name	<input type="text"/>			
capacity	<input type="checkbox"/> director <input type="checkbox"/> secretary (company trustees only)			
signature	<input type="text"/>	date	<input type="text"/> / <input type="text"/> / <input type="text"/>	

## Lodging your application form

Please forward your completed form and cheque to your financial adviser. Alternatively, you can post the form and cheque to the address below (no stamp required if posted in Australia).

**Reply Paid 4171**  
**Perpetual's Pooled Super Trust**  
**GPO Box 4171**  
**Sydney NSW 2001**

## Adviser use only

adviser's name																																							
postal address																																							
suburb																			state				postcode																
phone (business hours)																			mobile																				
email																																							
[1] Perpetual adviser ID																																							
OR [2] dealer group AND																																							
dealer branch*																																							
*City or suburb of the dealer group office you operate through																																							
adviser signature																			date			/			/					