Perpetual

Perpetual WealthFocus Investment Funds

Perpetual Investment Management Limited ABN 18 000 866 535 AFSL 234426

Switch form

Please complete this form in black ink using BLOCK letters.

This form must be completed when switching between Funds in Perpetual WealthFocus Investment Funds.

1. Investor details (must be completed)

client number	
account number	
account name	
contact number*	
email address*	

* If you provide your contact number and email address we will update our records accordingly.

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

☐ yes ☐ no

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

name of investment option	$ or %
WealthFocus Perpetual Diversified Income Fund	
WealthFocus Perpetual Industrial Share Fund	
WealthFocus Barrow Hanley Global Share Fund	
Total	

Switch to

name of investment option	$ or %
WealthFocus Perpetual Diversified Income Fund	
WealthFocus Perpetual Industrial Share Fund	
WealthFocus Barrow Hanley Global Share Fund	
Total	

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

I/We have received and read the current Perpetual WealthFocus Investment Funds Product Disclosure Statement (PDS) and agree to be bound by the provisions of the Funds' constitutions and any other additional restrictions contained in the PDS.
I/We acknowledge that switching from one Fund to another could realise a gain which may have tax implications.

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 Perpetual WealthFocus Investment Funds PDS (including but not limited to the Feature 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 a Fund.
- Joint applicants will be assumed to be joint tenants unless otherwise specified.
- 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.
- 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

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, Australia, or fax to 02 8256 1427.

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