

# 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 Pension Plan.

## 1. Member details (must be completed)

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

## 2. Switch details

Switch from		Switch to	
name of investment option	\$ or %	name of investment option	\$ or %
<b>Total</b>		<b>Total</b>	

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.

**Please note:** Investment in Perpetual Geared Australian investment option is restricted to a maximum of 30% of your account balance in the Pension Plan. You must tick the box in Section 4 if this switch represents your first investment into this investment option.

There may also be circumstances where we consider that processing a switch will not be consistent with our duties as trustee of the Fund, such as where we consider that processing the switch is not in the best interests of members 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.

## 3. Investment strategies

Your investment strategy is used for pension payment drawdowns and (where applicable), the dollar cost averaging plan, auto-rebalancing and compulsory rebalancing.

Please update my investment strategy to reflect my investment portfolio following the switch requested in section 2 above.

yes (default)     no

If no selection is made, 'Yes' will be assumed.

## 4. Compulsory rebalancing

**Compulsory rebalancing applies periodically if you hold an investment in Perpetual Geared Australian investment option.**

You only need to complete this section 4 if:

- this switch represents your first investment into Perpetual Geared Australian investment option; **and**
- you have not selected the optional **auto-rebalancing** feature.

Compulsory rebalancing frequency:  quarterly  half yearly  yearly (default)

If you do not nominate a frequency, compulsory rebalancing to your current investment strategy (see section 3 of this form) will occur yearly at the next unit pricing date on or after (as applicable) the 24th of July.

## 5. Applicant signature and declaration

**Please note:** The terms and conditions for the investment options you have selected may differ from your previous selection.

Please contact your financial adviser, call our Client Services on 1800 022 033 or visit our website at [www.perpetual.com.au](http://www.perpetual.com.au) for a copy of the current Product Disclosure Statement with details of all available investment options.

### Perpetual Geared Australian investment option

(You must read and tick the box below if this switch represents your first investment into Perpetual Geared Australian investment option)

I have thoroughly read the 'Understanding investment risk', 'Gearing risk' and 'Investment limit' sections of the WealthFocus Pension Plan PDS Part 1 (the PDS). I understand the greater risks associated with my selection of the Perpetual Geared Australian investment option and that it has a suggested investment timeframe of seven years or more. I acknowledge and accept that, if the value of my investment in Perpetual Geared Australian investment option has risen above or falls below my nominated percentage allocation at my nominated review date (or the default frequency if I do not make a nomination) it will be automatically rebalanced to my nominated percentage allocation across my investments. I acknowledge that the buy/sell spread will apply to this rebalancing transaction.

signature	<input type="text"/>	date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
print name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Forward your completed form to:

**Reply Paid 4171**  
**Perpetual WealthFocus Pension Plan**  
**GPO Box 4171**  
**Sydney NSW 2001**

Alternatively, you can send us a copy by email:

Email: [investments@perpetual.com.au](mailto:investments@perpetual.com.au)