Application for Additional Investment and Features Form

Please complete this form in black ink using BLOCK letters. All pages of this form must be returned to us.
Section 1 and 9 must be completed.

1. Member details (must be completed)

client number		account number	
account name			
contact number*			
email address			

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

By providing my email address, I agree to receive any information about my investment (such as transaction confirmations, statements, reports and other materials or notifications required by the Corporations Act) electronically. This may include email notifications advising me when new information regarding my investment is available for viewing online, via hyperlink or via myPerpetual. I acknowledge you may still need to send me information by mail from time to time.

2. Features

Indicate which optional features you would like applied to your account.

BPAY (additional contributions)	yes (default) ☐	no ☐
Auto-rebalancing If you are investing in Perpetual Geared Australian investment option you must tick 'Yes' to the auto-rebalancing feature and complete the 'investment strategy' column in the following section.	yes ☐	quarterly (default) ☐ half-yearly ☐ yearly ☐
Nomination of beneficiary If you would like to nominate a beneficiary to receive your benefit on death complete the 'Nomination of beneficiary' form.	yes ☐	no ☐
Investor myPerpetual online access	view & transact (default) ☐	view only ☐
Adviser myPerpetual online access Note: your financial adviser can access information about your account online (and may extend to their authorised delegates the same level of online access you have determined for your adviser).	view & transact (default) ☐	view only ☐
Investment information to be sent in the mail Note: most of your investment information is also available online through myPerpetual.	online only (default) ☐	online and email ☐
Annual report to be sent in the mai Note: the annual report is also available on our website.	no (default) ☐	yes ☐
Marketing material If you would like to receive investment education material and be informed about our products, services and offers.	yes (default) ☐	no ☐

- For each optional feature you have elected, please ensure you have read and understood the relevant section in the Features Book for that feature.
- If you have nominated an optional feature above, please ensure you fill out the relevant columns in the table in the following section.

3. Contribution details for Savings Plan

Only complete this section if you would like to establish a savings plan to make regular contributions from a nominated bank account. You will also need to nominate a bank account in section 6, from which contributions will be deducted under the savings plan.

Contribution type If you are eligible and intend to claim a tax deduction on your personal contributions you will need to complete section 5.	personal ☐ spouse ☐
Amount	$
Frequency	monthly (default) ☐ quarterly ☐

4. Contribution/rollover details

Payment details

How will the additional contribution be made?

NOTE: Cash is not accepted. Employer contributions can only be made using SuperStream.

direct debit	☐	we will debit your bank account nominated in section 6. I acknowledge and accept the terms and conditions of direct debit as explained in the Direct Debit Request Service Agreement which is available by following the links to downloading the PDS from www.perpetual.com.au/wealthfocus-super-updates.aspx
rollover	☐	make sure you complete and send the 'Transfer authority' form to your current superannuation provider

Please indicate below the amount of your additional contribution and/or rollover (please ensure that your previous superannuation provider has been instructed to rollover your funds).

Contribution limits: Please refer to the Features Book for information about contribution limits. You should speak to your financial adviser about these limits when considering your situation. Contributions made in excess of the limits will attract additional tax.

One-off contributions

Contribution type	Amount	Further details
personal contribution	$	If you are eligible and intend to claim a tax deduction on these contributions you will also need to complete section 5.
spouse contribution	$	
downsizer contribution	$	You will also need to complete a 'Downsizer Contribution into superannuation' form (available from the ATO).
CGT contribution	$	You will also need to include a completed 'Capital gains tax cap election' form (available from the ATO).
personal injury payment	$	You will also need to include a completed 'Contributions for personal injury election' form (available from the ATO).
COVID-19 re-contribution	$	You will also need to include a completed Notice of re-contribution of COVID-19 early release amounts form (available from the ATO).
Total	**$** 0.00	

4. Contribution/rollover details (continued)

Rollovers

If you are transferring from another super fund please provide the below details. You will also need to complete the 'Transfer authority' form for each rollover being requested.

Name of the previous institution	Policy /Account number	Approximate amount
		$
		$
		$
		$
		$
	Total	$ 0.00

5. Tax deduction for personal contributions

Tax deduction for your personal contributions

Please refer to the Features Book for information about your eligibility to claim a tax deduction for your personal contributions.

I am eligible and intend to claim a tax deduction for my personal contributions of: $

This is your notice to us, to be effective from the later of the date of this application or the date that you become a member of the Super Plan, of the amount you intend to claim as a tax deduction in relation to Section 290-170 of the Income Tax Assessment Act 1997. We will deduct 15% contributions tax from this amount. This notice will be applicable for the current financial year unless you notify us in writing of your intention to vary this notice. We will send you an acknowledgement of the amount you wish to claim as a tax deduction which you will need to retain for tax purposes for the current financial year.

6. Bank account details

You can only nominate a bank account that is held in your name.

By providing your bank account details in this section, you accept the terms in the direct debit agreement and authorise us to use these details for all future transaction requests that you nominate.

Complete your bank account details in this section and indicate what you would like us to use these bank account details for

☐ contributions ☐ savings plan

financial institution

branch

BSB ___ – ___ account number

account name

signature of account holder A date / /

signature of account holder B date / /

I request and authorise Perpetual Investment Management Limited, Debit User Identification Number 092646 to arrange for any amount Perpetual Investment Management Limited may debit or charge me to be debited through the Bulk Electronic Clearing System from an account held at the financial institution identified above, subject to the terms and conditions of the direct debit service agreement which is available by following the links to downloading the PDS from www.perpetual.com.au/wealthfocus-super-updates.aspx

7. Investment allocation

I would like to have my additional investment invested according to my existing investment strategy. ☐ yes ☐ no

If 'yes', your additional investment will be allocated in accordance with your last valid instruction to us.

If 'no' please complete the Investment Strategy column below, which will form our instruction to apply any other future contributions using the strategy below.

Investment options	short code	initial investment $ or %	savings plan $	investment strategy (additional applications & auto-rebalancing) (remember to identify which feature you want in section 2) %
Cash				
Perpetual Cash	PSCA			
Fixed income				
Perpetual Diversified Income	PISDIN			
Schroder Fixed Income	PISDAB			
Vanguard Australian Fixed Interest Index	PISVGY			
Property & Infrastructure				
Lazard Global Listed Infrastructure	PISLGL			
Vanguard Australian Property Securities Index	PISVGP			
Australian shares				
Ausbil Australian Active Equity	PISUBA			
Fidelity Australian Equities	PISFID			
Investors Mutual Australian Share	PISIMA			
Perpetual Australian Share	PSAS			
Perpetual Concentrated Equity	PISCEF			
Perpetual ESG Australian Share	PISSRF			
Perpetual Geared Australian	PISGAF	(max 50%)	(max 50%)	(max 50%)
Perpetual Industrial Share	PSIS			
Perpetual SHARE-PLUS Long-Short	PISSPF			
Perpetual Smaller Companies	PSSC			
Vanguard Australian Shares Index	PISVGA			
International shares				
Barrow Hanley Global Share	PSIT			
Magellan Global	PISAAI			
MFS Global Equity	PISMFG			
Perpetual Global Allocation Alpha	PSSG			
T. Rowe Price Global Equity	PISTRP			
Vanguard International Shares Index	PISVIS			
Vanguard International Shares Index (Hedged)	PISVGI			

7. Investment allocation (continued)

Investment options	short code	initial investment $ or %	savings plan $	investment strategy (additional applications & auto-rebalancing) (remember to identify which feature you want in section 2) %
Multi-asset – conservative				
Perpetual Conservative Growth	PSCG			
Multi-asset – balanced				
Perpetual Diversified Growth	PSDG			
Perpetual Diversified Real Return	PISDRR			
Multi-asset – growth				
BlackRock Tactical Growth	PISUBB			
Perpetual Balanced Growth	PSBG			
New investment options – added after the PDS issue date				
Total		**0.00**	**0.00**	**0** 100%

1 The investment strategy applies to all your additional investments. If you make an additional investment it will be invested according to your investment strategy. If you request to have your investment auto rebalanced, it will be rebalanced according to your investment strategy. If you do not complete the investment strategy above, your investment strategy will be set according to the additional investments above, or any subsequent written instruction we receive from you.

8. Financial adviser use only

Financial adviser details

financial adviser name

phone (after hours) phone (business hours)

mobile fax

postal address

AFSL licensee name AFSL number

adviser number

dealer group dealer branch

email address

financial adviser signature date / /

ADVISER STAMP

IL GN / / (Group)

IL AN / / (Adviser)

IL CN / / (Client)

9. Declaration and signature **(must be completed)**

I declare and agree that:

- I have read and understood the current Product Disclosure Statement (PDS) and any relevant incorporated material for WealthFocus Super Plan
- I agree to be bound by any additional restrictions in the current PDS and any incorporated material (as amended from time to time)
- all of the information provided in my application is true and correct
- I have read and understood the privacy disclosure as detailed in the PDS. I consent to my personal information being collected, held, used and disclosed in accordance with the privacy disclosure. I consent to the Trustee disclosing this information to my financial adviser (named in this form) in relation to the investments described in this form. Where the financial adviser named in this form no longer acts on my behalf, I will notify the Trustee of the change
- If I have received the PDS from the internet or other electronic means that I received it personally or a print out of it, accompanied by this additional investment form
- If applicable, in the case of contributions, that I have read and understood the contribution eligibility rules in the PDS and that I am eligible to make or have contributions made for my benefit and will notify the Trustee if I am no longer eligible
- I understand that I am responsible for my contributions, and that contributions in excess of limits will attract additional tax
- If I am claiming a personal tax deduction in relation to my contributions:
  - I intend to claim the personal contributions stated as a tax deduction
  - I am a current member of the Perpetual WealthFocus Super Fund
  - Perpetual WealthFocus Super Fund currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part on these contributions
  - I have not included any of the contributions in an earlier valid notice.

I declare that I am lodging this notice at the earlier of either:

- before the end of the day that I lodged my income tax return for the income year in which the personal contributions were made, or
- before the end of the income year following the year in which the contribution was made.

- I authorise the Trustee to quote my TFN to the Australian Taxation Office (ATO).
- I authorise the Trustee to obtain information from the ATO regarding my superannuation account in relation to my TFN, PAYG or other superannuation tax-related matters.
- Where I have agreed to pay my adviser a member advice fee, this fee is for personal financial advice received relating to my investment in the Super Plan.

I acknowledge that:

- the Trustee is required to provide information to the ATO regarding any superannuation account
- the Trustee will hold personal information about me and will disclose this information to my financial adviser (named in this form) in relation to the investments described in this form. Where there is any change to this authority or relating to my financial adviser, I will notify the Trustee of the change.
- neither the Trustee, Perpetual Investment Management Limited, nor any of their related entities guarantees the repayment of capital or the performance of the Super Plan or any investment option.

Perpetual Geared Australian investment option

(You must read and tick the box below if you have chosen to invest in Perpetual's Geared Australian investment option)

☐ I have thoroughly read the 'Understanding investment risk' section, 'Gearing risk' section and 'Investment limits' section of the Features book. I understand the greater risks associated with my selection of this 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 this investment option has risen above or fallen below my nominated percentage allocation (or the default percentage allocation if I do not make a nomination) 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 (or default percentage allocation) across my investments. I acknowledge that the buy/sell spread will apply to this rebalancing transaction.

signature ______________________ date ___ / ___ / ______

print name ______________________

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