Perpetual

WealthFocus Super Plan
WealthFocus Pension Plan

Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458

Fixed term advice fee consent

You can use this form to provide consent to the payment of a fixed term advice fee from your account.

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. Frequency and amount of fixed term advice fee

The fixed term advice fee will commence on the start date you specify below and will end a maximum of 12 months later.

From the fixed term start date, this fixed term advice fee consent replaces any existing fixed term or ongoing fee arrangements previously provided in respect of the account specified above.

Fixed term advice fees are paid monthly by redeeming units from your account. A percentage fixed term advice fee is calculated on the average daily balance of your account over the month.

The maximum total fixed term advice fee is 3% p.a. of your account balance.

Fixed term advice fee

Start date ______ (maximum 60 days from the date this form is signed)

Fixed term ______ months (maximum 12)

Amount (including GST less any RITC available to the Fund) ______ % p.a.

The fixed term advice fee is to be paid as a deduction pro rata across your investment portfolio.

Based on your current account balance, an estimate of the advice fee payable over the fixed term is $ ______

An explanation of the method used to work out the estimate.

You may withdraw your consent to the fixed term advice fee at any time before a redemption is made by contacting us on 1800 011 022. Any instruction received after 3pm will be processed on the following business day.

We can also refuse or discontinue to pay the fixed term advice fee.

3. Services provided for the above fee

Please outline or attach the services that the account holder is entitled to receive for the fixed-term advice fee. These must fall within the range of services listed in section 6. Please indicate below if using an attachment.

4. Financial adviser acknowledgement

I will promptly notify the Trustee in writing if I am no longer entitled to receive this fee.

I confirm that the service to be provided to the account holder for the fixed term fee arrangement fall within the range of services listed in section 6. "Services for which you may agree to pay a fixed term advice fee".

I acknowledge that where agreed services are not provided to the client, the Trustee reserves the right to clawback fees.

print name	
dealer group	
adviser number	
email	
phone (business hours)	

5. Declaration and investor signature(s) (must be completed)

I declare that:

- all details in this form are true and correct
- I consent to my adviser or my adviser's licensee, receiving the amount specified in section 2 and to the deduction of this amount, via a redemption of units from the account, as specified above
- if signing under a power of attorney, I have not received notice of revocation of that power*

I confirm that:

- the amount specified above is consistent with a fee arrangement that I have entered into with my adviser and solely relates to my interest in the Plan
- the amount specified above is a reasonable amount for the advice services that have or will be provided to me
- if I wish to withdraw my consent, I may do so at any time before the fee is deducted from the account by contacting the Trustee on 1800 011 022

I acknowledge and agree that:

- by consenting to the above advice fee, my account balance and potential future returns will reduce
- The Trustee may in its absolute discretion decline to pay the advice fee and I understand that it may be an offence, including an early release of superannuation scheme, if the details and confirmations in this form are not true and correct.

signature of investor

date

print name

* Please include the power of attorney (or a certified copy) with this form if it has not previously been provided to us.

6. Services for which you may agree to pay a fixed term advice fee

Advisers are able to charge advice fees for the following services provided in relation to your WealthFocus Super or WealthFocus Pension account:

- account establishment and commencement
- periodic review of your account
- strategic superannuation advice
- management and administration of your account
- superannuation investment portfolio advice
- superannuation contribution strategy
- insurance in superannuation strategy
- superannuation withdrawal advice and management

Important notes

- Please read the relevant PDS before completing the form. Advice fees are referred to as member advice fees in the PDS.
- If you have any questions about this form, or your account, please call us on 1800 011 022 during business hours (Sydney time), visit www.perpetual.com.au or email superandpension@perpetual.com.au

Please send the completed form to:

Reply Paid 4171, Perpetual WealthFocus Super and Pension
GPO Box 4171, Sydney, NSW 2001, Australia

or email: **superandpension@perpetual.com.au**

No stamp required if posted in Australia.

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