



### 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.

**The minimum savings plan regular contribution is \$100 per investment option.** Your current balance in an investment option must exceed the minimum balance requirements to be able to set up a savings plan for that investment option. Where the frequency is not nominated the default is monthly.

<b>Contribution type</b> If you are eligible and intend to claim a tax deduction on your personal contributions you will need to complete section 5.	personal <input type="checkbox"/> spouse <input type="checkbox"/>
<b>Amount</b> minimum is \$100 per investment option	\$ <input type="text"/>
<b>Frequency</b>	fortnightly <input type="checkbox"/> monthly (default) <input type="checkbox"/> quarterly <input type="checkbox"/>

### 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.

<input type="checkbox"/> 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 <a href="http://www.perpetual.com.au/wealthfocus-super-updates.aspx">www.perpetual.com.au/wealthfocus-super-updates.aspx</a>
<input type="checkbox"/> 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).
<b>Total</b>	<b>\$</b>	

## 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
		\$
		\$
		\$
		\$
		\$
		\$
	<b>Total</b>	\$

## 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 Perpetual 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](http://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	savings plan (min \$100 per option)	dollar cost averaging plan	investment OR strategy (additional applications & auto-rebalancing)
		\$ or %	\$	(remember to identify which feature you want in section 8)	
				%	
<b>Cash</b>					
Perpetual Cash	PSCA				
<b>Fixed income</b>					
Bentham Global Income	PISCSG				
Macquarie Income Opportunities	PISUBY				
Perpetual Diversified Income	PISDIN				
Perpetual Dynamic Fixed Income	PISARF				
Schroder Fixed Income	PISDAB				
Vanguard Australian Fixed Interest Index	PISVGY				
<b>Property &amp; Infrastructure</b>					
Lazard Global Listed Infrastructure	PISLGL				
Pendal Property Securities	PISHSP				
Vanguard Australian Property Securities Index	PISVGP				
<b>Australian shares</b>					
Ausbil Australian Active Equity	PISUBA				
Ausbil Australian Emerging Leaders	PISELF				
Fidelity Australian Equities	PISFID				
Investors Mutual Australian Share	PISIMA				
Pendal Australian Equity	PISBTA				
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				
Schroder Australian Equity	PISSCH				
Vanguard Australian Shares Index	PISVGA				

## 7. Investment allocation (continued)

Investment options	short code	initial investment	savings plan (min \$100 per option)	dollar cost averaging plan OR investment strategy (additional applications & auto-rebalancing)
		\$ or %	\$	(remember to identify which feature you want in section 8) %
<b>International shares</b>				
Barrow Hanley Global Share	PSIT			
Magellan Global	PISAAI			
MFS Global Equity	PISMFG			
Perpetual Global Allocation Alpha	PSSG			
Perpetual Global Innovation Share	PISINA			
Platinum Asia	PISPAF			
Platinum International	PISPLI			
T. Rowe Price Global Equity	PISTRP			
Vanguard International Shares Index	PISVIS			
Vanguard International Shares Index (Hedged)	PISVGI			
<b>Diversified – conservative</b>				
BlackRock Diversified ESG Stable	PISBGC			
Perpetual Conservative Growth	PSCG			
<b>Diversified – balanced</b>				
Perpetual Diversified Growth	PSDG			
Perpetual Diversified Real Return	PISDRR			
<b>Diversified – growth</b>				
BlackRock Diversified ESG Growth	PISBGG			
BlackRock Tactical Growth	PISUBB			
Morningstar Growth Real Return	PSBLG			
Perpetual Balanced Growth	PSBG			
Schroder Sustainable Growth	PISSCG			
<b>New investment options – added after the PDS issue date</b>				
<b>Total</b>				<b>100%</b>

1 If you request to have the dollar cost averaging plan, switches will be made from Perpetuals' Cash investment option and invested according to your nominated allocation.

2 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.



## 9. Declaration and signature (continued)

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 Perpetual to quote my TFN to the Australian Taxation Office (ATO).
- I authorise Perpetual 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:

- Perpetual is required to provide information to the ATO regarding any superannuation account
- Perpetual 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 Perpetual of the change.
- neither the Trustee nor any other company in the Perpetual Group 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	<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"/>