



**Perpetual WealthFocus Pension Plan**

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315  
 Perpetual's Investor Choice Retirement Fund ABN 41 772 007 500 RSE R1057010

# Switch form

Please complete all pages of this form in black ink using **BLOCK** letters.

If you are a current investor with Perpetual, please complete.

## 1. Investor details (must be completed)

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

## 2. Switch details

**Applications and redemptions are suspended from the Australian Unity Mortgage Income, Challenger Howard Mortgage, APN Property for Income and Perpetual's Mortgage Investment Options. Please see our website for any updated information.**

Please make the following alternation to my investment in:

Perpetual WealthFocus Term Allocated Pension

Perpetual WealthFocus Account Based Pension

Switch from (insert name of Investment Option)

<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
Total	\$	<input type="text"/>	or	<input type="text"/>	%

Switch to (insert name of Investment Option)

<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
<input type="text"/>	\$	<input type="text"/>	or	<input type="text"/>	%
Total	\$	<input type="text"/>	or	<input type="text"/>	%

Please note: Investment in Perpetual's Geared Australian and Perpetual Global Resources Investment Options 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.



### 3a. Investment Strategy Update

Please update my Investment Strategy to reflect the above switch.

yes     no

Please note, your investment strategy is used for the auto-rebalancing feature, and pension payments (where applicable).  
If no selection is made, 'Yes' will be assumed.

### 3b. Auto-rebalancing

Please note this section is only applicable if this switch represents your first investment into Perpetual's Geared Australian and Perpetual Global Resources Investment Options and you currently do not have auto-rebalancing.

yes     no                      frequency:  quarterly     half yearly     annually

If no selection is made, 'Yes' will be assumed. If you do not nominate a frequency the default of 'Quarterly' will be assumed. The investment strategy will be based on your investments after the switch unless specified in writing by you. This will also form the basis of your pension payments.

## 4. 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 Investor Services Centre 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's Geared Australian and Perpetual Global Resources Investment Options

(You must read and sign the below if this switch represents your first investment into Perpetual's Geared Australian and/or Perpetual Global Resources Investment Options)

I have thoroughly read the 'Understanding investment risk' section of pages 4-6 of the WealthFocus Pension Plan PDS Part 1 (the PDS), 'Gearing risk' section on page 5 of the PDS and 'Limits for Perpetual's Geared Australian Investment Option' section on page 6 of the PDS. I understand the greater risks associated with my selection of the Perpetual's Geared Australian and/or Perpetual Global Resources Investment Options 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's Geared Australian and/or Perpetual Global Resources Investment Options has risen above or falls 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 of investor											date	<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"/>		
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"/>	<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 your financial adviser or deliver to Perpetual's Sydney office at Level 12, 123 Pitt Street, Sydney. Alternatively, you can post the form to **Reply Paid 4171, Perpetual WealthFocus Pension Plan, GPO Box 4171, Sydney NSW 2001 Australia** (No stamp required if posted in Australia to this address).