

# Switching advice - Portfolio Service

Please complete in blue or black ink, using BLOCK letters



## Section 1 - Member Details

<input type="text"/>	<input type="text"/>
Surname/Company name/Trustee name	Member number
<input type="text"/>	<input type="text"/>
Given name(s)/ABN	Telephone number
<input type="text"/>	
Email	
<input type="text"/>	
Adviser name	
<input type="text"/>	<input type="text"/>
Adviser telephone number	Adviser fax

## Section 2 - Instructions

I/We hereby request the redemption and investment of the amounts identified and described below.

Redemption				Investment			
Investment Name(s)	(%)	Amount (\$)	Min. sell price (\$)*	Investment Name(s)	(%)	Amount (\$)	Min. buy price (\$)*
<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"/>	<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"/>

\* Only available when requesting share transactions.

## Section 3 - Authorisation

I/We acknowledge that:

- We have received all the information we reasonably require to understand the effect of any risk involved in the request set out above.
- The Trustee shall act on this request as soon as is reasonably practicable but does not accept liability for any loss caused by delays that may occur, and that, significant delays can occur because of the need for the Trustee to receive funds from any redemption before making an investment or because certain investments have minimum stipulated transaction amounts, in which case my request will not be actioned until the Trustee has accumulated sufficient requests to transact at the minimum level.
- This form only provides for a "one-off" alteration of my investment strategy and that new contributions (if any) will be invested according to the proportions and strategies indicated on my Investment Strategy Form.

A new Investment Strategy Form may be submitted at any time to vary the investment of new contributions from the date of receipt of the form.

<input style="width: 95%; height: 25px;" type="text" value="X"/>	<input style="width: 95%; height: 25px;" type="text"/>
Signature	Date

<input style="width: 95%; height: 25px;" type="text" value="X"/>	<input style="width: 95%; height: 25px;" type="text"/>
Signature	Date