

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)

| account name | client number | | | | acco | ount n | umbe | r | | | | | |
|---------------|-----------------|--|--|--|------|--------|------|---|--|--|--|--|--|
| | account name | | | | | | | | | | | | |
| omail addrose | 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 🗌 |
|---|---------------------------|---|
| Dollar cost averaging plan Select your investment options in the following section. Note: you cannot select both dollar cost averaging and auto-rebalancing for the same account. | yes\$per frequency | fortnightly monthly (default) quarterly |
| Auto-rebalancing Note: you cannot select both dollar cost averaging and auto-rebalancing for the same account. 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 I would like to receive investment education material and be informed about Perpetual's 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.

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.

| 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 minimum is \$100 per investment option | \$ |
| Frequency | fortnightly 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.

| | 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 |
|--------------|---|
| direct debit | 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 | \$ | |

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 | | \$ |

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 | l to claim a tax | deduction for my | personal contributions of: |
|----------------------------|------------------|------------------|----------------------------|
| i uni oligibio una intoria | to olumn a tax | acaded of the my | |

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.



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 | savings plan (min \$100 per option) | dollar investment cost OR strategy averaging plan applications & auto-rebalancing) |
|---|---------------|-----------------------|--|---|
| | | \$ or % | \$ | (remember to identify which feature you want in section 8) |
| | | | | % |
| Cash | | | | |
| Perpetual Cash | PSCA | | | |
| Fixed income | | | | |
| 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 | | | |
| Property & Infrastructure | | | | |
| Lazard Global Listed Infrastructure | PISLGL | | | |
| Pendal Property Securities | PISHSP | | | |
| Vanguard Australian Property Securities Index | PISVGP | | | |
| Australian shares | | | | |
| 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 investment cost OR strategy averaging (additional applications & auto-rebalancing) |
|---|---------------|-----------------------|--|---|
| | | \$ or % | \$ | (remember to identify which feature you want in section 8) |
| International shares | | | | % |
| 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 | | | |
| Diversified – conservative | | | | |
| BlackRock Diversified ESG Stable | PISBGC | | | |
| Perpetual Conservative Growth | PSCG | | | |
| Diversified – balanced | | | | |
| Perpetual Diversified Growth | PSDG | | | |
| Perpetual Diversified Real Return | PISDRR | | | |
| Diversified – growth | | | | |
| BlackRock Diversified ESG Growth | PISBGG | | | |
| BlackRock Tactical Growth | PISUBB | | | |
| Morningstar Growth Real Return | PSBLG | | | |
| Perpetual Balanced Growth | PSBG | | | |
| Schroder Sustainable Growth | PISSCG | | | |
| New investment options – added after the PDS is | ssue date | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total | | | | 100% |

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.

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 |
| Perpetual adviser number | |
| dealer group | dealer branch |
| email address | |
| financial adviser signature | date / / ADVISER STAMP |
| | (Group) (Adviser) (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 Perpetual 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 Perpetual 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.

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 ninvestment 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.

