



Perpetual MySuper

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual's Select Superannuation Fund ABN 51 068 260 563 RSE R1057034
MySuper product authorisation number 51068260563643

APPLICATION FOR ADDITIONAL INVESTMENT AND FEATURES FORM

Please complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS. Mark appropriate boxes with a cross like the following . Start at the left of each answer space and leave a gap between words.

1. Investor details (must be completed)

client number	<input type="text"/>	account number	<input type="text"/>
investor name	<input type="text"/>		
contact numbers* phone	<input type="text"/>	mobile	<input type="text"/>
email address*	<input type="text"/>		

* If you provide these details we will update our records accordingly

2. Payment details (must be completed)

How will the contribution be made? NOTE: Cash is not accepted.

by direct debit	<input type="checkbox"/>	we will debit your bank account nominated in section 5. I acknowledge and accept the terms and conditions of direct debit as explained in the Direct Debit Request Service Agreement which is available from www.perpetual.com.au/select-super-updates .
by cheque	<input type="checkbox"/>	make cheque payable to: PIML – MySuper – [insert name of member]
by rollover	<input type="checkbox"/>	make sure you complete and send a 'Transfer authority' form to your current superannuation provider

3. Contribution/rollover details (individual members must complete/optional for employee members)

Please indicate below the amount of your contributions and/or rollover (please ensure that your previous superannuation provider has been instructed to rollover your funds). **Note:** Where you are joining through an employer who has nominated MySuper as their 'default' fund, your employer will forward separate instructions to us.

Contribution limits: Please refer to the 'Your MySuper account' document for information about contribution limits, including changes applicable from 1 July 2017. 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.

Initial 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.
employer contribution		These contributions can only be paid to us using SuperStream. We cannot accept a cheque.
salary sacrifice contribution		These contributions can only be paid to us using SuperStream. We cannot accept a cheque.
spouse contribution	\$	
CGT contribution	\$	You will also need to include a completed CGT cap election form (available from the ATO).
personal injury payment	\$	You will also need to include a completed contribution for personal injury form (available from the ATO).
Total	\$	

3. 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 from our website for each rollover being requested and send it to your previous superannuation provider.

Name of the previous institution	Policy /Account number	Approximate amount
		\$
		\$
		\$
		\$
		\$
Total		\$

4. Tax deduction for personal contributions

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 MySuper, 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 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 year.

5. Bank account details (if applicable)

By providing your bank account details in this section, you 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

applications withdrawals
financial institution

branch

BSB

account number

____ - ____

account name

signature of account holder A

signature of account holder B

date ____ / ____ / ____

I request and authorise Perpetual Investment Management Limited, Debit User Identification Number 187310 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 Request Service Agreement which is available from www.perpetual.com.au/select-super-updates.

6. Features (must be completed)

Indicate which optional features you would like applied to your account	Frequency (if applicable)
BPAY (additional investments) yes (default) <input type="checkbox"/> no <input type="checkbox"/>	n/a
Investor Online Account Access ► you can access information about your account online view & transact (default) <input type="checkbox"/> view only <input type="checkbox"/> no access <input type="checkbox"/>	n/a
Adviser Online Account Access Note: your adviser can access information about your account online view & transact (default) <input type="checkbox"/> view only <input type="checkbox"/>	n/a

For each optional feature you have elected, please ensure you have read and understood the relevant section in the Perpetual MySuper 'Your MySuper account' document available on our website.

7. Adviser use only

adviser name																													
phone (business hours)													mobile																
email																													
[1] Perpetual adviser ID																													
OR [2] dealer group AND																													
b.dealer branch*																													
*City or suburb of the dealer group office you operate through																													
If Senior Adviser details are completed above, please also provide name of your accountant																													
adviser signature													date	/		/													
<div style="border: 1px solid black; border-radius: 50%; width: 100px; height: 100px; display: flex; align-items: center; justify-content: center;"> ADVISER STAMP </div>																													

8. Declaration and signature (must be completed)

I declare and agree that:

- I have read and understood the Product Disclosure Statement (PDS) and any relevant incorporated material for MySuper and confirm I accept this offer in Australia
- all of the information provided in my application is true and correct
- 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 or attached to this application form
- I have read, understood and agree to be bound by, any additional restrictions in the PDS and any incorporated material and I agree to be bound by the provisions of the Trust Deed (as amended from time to time)
- 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
- 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 MySuper
 - MySuper currently holds these contributions and has not begun to pay a superannuation income stream based in whole or part of these contributions
 - I have not included any of the contributions in an earlier valid notice.
- 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.
- I acknowledge that neither the Trustee nor any other company in the Perpetual Group guarantees the repayment of capital or the performance of Perpetual MySuper or the investment option.
- I acknowledge that:
 - I have read and understand 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
 - 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 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 Perpetual MySuper and the investment option.

signature of
investor

date

 / /

print name

Important notes:

- If signing under power of attorney, the attorney certifies that he or she has not received notice of revocation of that power. The power of attorney, or a certified copy, must be sent to Perpetual, if not previously provided.
- Perpetual has the absolute discretion to accept or reject any application.
- A business day is a working day for Perpetual in Sydney.

Final checklist

Have you:

- Completed all sections of your application form?
- Signed your application form?

Please send your completed application form to:

Reply Paid 4171
Perpetual MySuper
GPO Box 4171, Sydney NSW 2001
or email selectfunds@perpetual.com.au