

CHANGE OF INSTRUCTIONS FORM

Please complete this form in black ink using BLOCK letters.

1. Applicant (must be completed)

client number	account number
account name	

2. Change of investor details

A. Individual and joint account holders

Investor 1 (individual account holder)

title
 Mr Mrs Miss Ms other

first name(s)

last name

occupation

date of birth / / gender
 male female

Residency status for tax purposes
Tax residency rules differ by country. Whether an individual is a tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the United States, tax residency can also be as a result of citizenship or residency.

Please answer **BOTH** of the following tax residency questions:

1. Are you a tax resident of Australia?

yes (complete the following details and then proceed to question 2 below) no (proceed to question 2 below)

tax file number (TFN)
 or

TFN exemption code

Investor 2 (joint account holder)

title
 Mr Mrs Miss Ms other

first name(s)

last name

occupation

date of birth / / gender
 male female

Residency status for tax purposes
Tax residency rules differ by country. Whether an individual is a tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the United States, tax residency can also be as a result of citizenship or residency.

Please answer **BOTH** of the following tax residency questions:

1. Are you a tax resident of Australia?

yes (complete the following details and then proceed to question 2 below) no (proceed to question 2 below)

tax file number (TFN)
 or

TFN exemption code

2. Change of investor details (continued)

A. Individual and joint account holders

Investor 1 (individual account holder)

2. Are you a tax resident of another country?

yes (complete the following details) no

If 'yes', please list all relevant countries and provide your tax identification number (TIN) for each country.
A TIN refers to the number assigned by a country for the purpose of administering its tax laws and is the equivalent of a TFN in Australia. If a TIN is not provided, please list one of the three reasons specified below (A, B or C) for not providing a TIN.

Country 1

TIN If no TIN, list reason A, B or C

Country 2

TIN If no TIN, list reason A, B or C

If there are more than two countries, provide details on a separate sheet and tick this box.

Reason A: The country of tax residency does not issue TINs to tax residents.

Reason B: I have not been issued with a TIN.

Reason C: The country of tax residency does not mandate provision of the TIN.

Residential address (mandatory)

unit number street number

street name

suburb

state postcode

country

phone (business hours)

phone (after hours)

mobile

email address

Provide your email address and we will provide you with email notification of new account correspondence as it becomes available.

Investor 2 (joint account holder)

2. Are you a tax resident of another country?

yes (complete the following details) no

If 'yes', please list all relevant countries and provide your tax identification number (TIN) for each country.
A TIN refers to the number assigned by a country for the purpose of administering its tax laws and is the equivalent of a TFN in Australia. If a TIN is not provided, please list one of the three reasons specified below (A, B or C) for not providing a TIN.

Country 1

TIN If no TIN, list reason A, B or C

Country 2

TIN If no TIN, list reason A, B or C

If there are more than two countries, provide details on a separate sheet and tick this box.

Reason A: The country of tax residency does not issue TINs to tax residents.

Reason B: I have not been issued with a TIN.

Reason C: The country of tax residency does not mandate provision of the TIN.

Residential address (mandatory)

unit number street number

street name

suburb

state postcode

country

phone (business hours)

phone (after hours)

mobile

email address

Provide your email address and we will provide you with email notification of new account correspondence as it becomes available.

2. Change of investor details (continued)

A. Individual and joint account holders – Postal address (optional)

Investor 1 (individual account holder)

po box	unit number	street number
street name		
suburb		
state	postcode	
country		

Investor 2 (joint account holder)

po box	unit number	street number
street name		
suburb		
state	postcode	
country		

B. All other account holders

company name		
name of superannuation fund, trust, partnership, association, government body or co-operative		
c/-		
po box	unit number	street number
street name		
suburb		
state	postcode	country
phone (business hours)	mobile	fax
email address		

Provide your email address and we will provide you with email notification of new account correspondence as it becomes available.

3. Change of authorised representative appointment

I/We have read and agree to the conditions applying to the appointment of an authorised representative as set out in the relevant Product Disclosure Statement.

Online Account Access for my authorised representative

view and transact (default) or view only or no access

authorised representative details:

first name(s)

last name

po box unit number street number

street name

suburb

state postcode country

signature of authorised representative date / /

4. Change of bank account details

You can only nominate a bank account that is held in your name(s). By providing your bank account details in this section, you accept the terms in the Direct Debit Request Service Agreement and authorise Perpetual to use these details for all future transaction requests that you nominate.

Bank account

Complete your account details in this section if you would like us to debit or credit your bank account for applications, withdrawals and payment of distributions, as applicable.

name of financial institution

branch name

branch number (BSB) - account number

name of account holder


signature of account holder A signature of account holder B

date / /

5. Change of financial adviser

Complete this section if you are changing your financial adviser.

I/We have a new financial adviser whose details appear below. I/We acknowledge that Perpetual will hold personal information about me/us and will disclose this information to my/our financial adviser. Where the financial adviser named in this form no longer acts on my/our behalf, I/we will notify Perpetual of the change.

name of financial adviser																								
postal address																								
suburb													state				postcode							
phone (business hours)													phone (mobile)											
email																								
Perpetual adviser number													or											
(a) dealer group													and											
(b) dealer branch location*																								
*City or suburb of the dealer group office you operate through																								
financial adviser signature													date			/			/					

6. Investor signature(s)

- Please sign this form where indicated below. This form must be signed as per the current signing instructions we have on record. If no amendments have been made, the current signatories for the account are the individuals who signed the initial investment application form.
- If we have not previously verified your identity, we will also require you to complete and submit the relevant 'Customer identification form' (available at Perpetual's website) with this form.
- If signed under power of attorney, the attorney certifies that he or she has not received notice of revocation of the power of attorney. Please include the power of attorney with this form if it has not previously been provided to Perpetual.
- For information, please call Perpetual on **1800 022 033** during business hours (Sydney time), visit www.perpetual.com.au or email investments@perpetual.com.au

signature of investor 1 or company officer	signature of investor 2 or company officer																							
print name																								
title																								
date			/			/																		
date			/			/																		

Please forward your completed form to your financial adviser or post to:

Perpetual Investments
GPO Box 4171, Sydney NSW 2001

Investment Link information

IL GN / / (Group)
 IL AN / / (Adviser)
 IL CN / / (Client)