

Share Transfer into Personal Investment Plan

1. Personal details

Investor 1

Title	Surname	Given names
<input type="text"/>	<input type="text"/>	<input type="text"/>

Company/Trust name

Address

Suburb/town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Telephone (home)	Telephone (business)	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>

Male	Female	Date of birth (dd/mm/yy)	Email address
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

ABN	TFN
<input type="text"/>	<input type="text"/>

Investor 2

Title	Surname	Given names
<input type="text"/>	<input type="text"/>	<input type="text"/>

Address

Suburb/town	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Telephone (home)	Telephone (business)	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>

Male	Female	Date of birth (dd/mm/yy)	Email address
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

ABN	TFN
<input type="text"/>	<input type="text"/>

2. Transfer details

Please list The Portfolio Service approved shares to be transferred and attach a copy of the holding statement for each share listed below.

Share name ASX code	Reinvest dividends ✓	Name of registered owner(s)	Is the share changing ownership? (Y/N) ⁽¹⁾	SRN/HIN ⁽²⁾	Complete only if there is no change in ownership			Office use only		
					Number of shares	Original acquisition Date	Amount paid ⁽³⁾	Date of transfer	Consideration	Price Used
	<input type="checkbox"/>									
	<input type="checkbox"/>									
	<input type="checkbox"/>									
	<input type="checkbox"/>									
	<input type="checkbox"/>									
	<input type="checkbox"/>									
	<input type="checkbox"/>									
	<input type="checkbox"/>									
	<input type="checkbox"/>									
IMPLEMENTATION FEE (up to 4%)										%

(1) If yes, please arrange for your planner to submit a separate worksheet itemising the changes that are being made in respect of the ownership and the Cost Bases of the parcel of shares.

(2) If you quote a HIN please complete 2.(i).

(3) Amount paid: being all costs inclusive of brokerage and any other costs associated with the original acquisition.

(i) Is the investor a Bridges sponsored client? Yes No

If no, please specify contact details for sponsoring broker.

Broker

Contact name

Contact number

Note: Corresponding instructions must be sent to sponsoring broker.

3. Transferor details

(i) Transferor/Company/Trustee 1

Title	Surname	Given names		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Company/Trust name				
<input type="text"/>				
Address				
<input type="text"/>				
Suburb/town	State	Postcode	Email address	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Telephone (home)	Telephone (business)	ABN	TFN	
<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"/>	

Transferor/Company/Trustee 2

Title	Surname	Given names		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Address				
<input type="text"/>				
Suburb/town	State	Postcode	Email address	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Telephone (home)	Telephone (business)	ABN	TFN	
<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"/>	

4. Privacy

Please tick this box if you do not wish to receive information on other products and services that may be of benefit to you. Please see the current Product Disclosure Statement for details on privacy and personal information.

5. Signature(s) and confirmations

By the transferor

- I/We acknowledge that the price attributed to the shares will be the sale price on the close of business of the Australian Stock Exchange on the date on which this application is signed.
- I/We am/are the absolute legal and beneficial owner(s) of the shares listed above which are not subject to any mortgage, charge or any encumbrance.
- I/We understand the taxation consequences (including capital gains tax) of making the transfer and have sought my/our own independent advice in respect of the transfer.

Signature transferor 1/director	Date
<input type="text"/>	<input type="text"/>
Signature transferor 2/director/company secretary	Date
<input type="text"/>	<input type="text"/>

By the investor(s)

- I/We have received, read and understood the current Product Disclosure Statement and the current List of Investment Strategies (which includes the securities that I propose to transfer).
- I/We acknowledge that the price attributed to the shares will be the sale price on the close of business of the Australian Stock Exchange on the date on which this application is signed.
- I/We understand the taxation consequences (including capital gains tax) of making the transfer and have sought my/our own independent advice in respect of the transfer.
- I/We acknowledge that the responsible entity may reject my/our application.
- I/We authorise the deduction from my/our investment portfolio of any fees, expenses and taxes.

Signature Investor 1/director

Date

Signature Investor 2/director/company secretary

Date

Financial planner only

Name

Phone number

AFSL holder

PortfolioNet account number

- I have given the investor a current offer document and investment report for each investment option selected and each investment option which I believe they considered.
- I have reviewed the investor's financial situation, needs and objectives and confirm the investment option(s) selected are appropriate and provide, when the investment portfolio is taken as a whole, adequate diversification.

Financial planner signature

Date