

Superannuation Plan Additional Investment

Please complete this form if you wish to make an additional investment to the Superannuation Plan

1. Personal details

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

2. Deposit amount

Contribution type	Amount
Employer (voluntary) see (a) over page	\$
Superannuation guarantee	\$
Personal contribution see (b) over page	\$
Spouse contribution see (c) over page	\$
Rollover(s)	
	\$
	\$
	\$
TOTAL*	\$
IMPLEMENTATION FEE (up to 4%)	%

(a) Name of employer

(b) Are you claiming a tax deduction for part or all of your personal contributions?

Yes No

Amount

(c) Name of contributing spouse

5. Signature and confirmations

- I have received, read and understood the current Superannuation Plan Product Disclosure Statement or investment report for each investment option I have selected or considered
- I am eligible to invest in the Superannuation Plan
- If you do not wish to receive information on other products and services that may be of benefit to you, please tick this box. Please see the current Product Disclosure Statement for details on privacy and personal information.

Signature

Date

Financial planner only

Name

Phone number

AFSL holder

PortfolioNet account number

Referring source

Financial institution's BSB number

 -

- The implementation fee applicable to the investment options to be purchased is recorded in section 2 of this form.
- The switching fee applicable to the investment option to be purchased is recorded in section 3 of this form
- I have given the investor a current Superannuation Plan Product Disclosure Statement or investment report for each investment option selected and for each investment option which I believe they considered
- I have reviewed the investor's financial situation, needs and objectives and confirm the investment options selected are appropriate and provide, when the investment portfolio is taken as a whole, adequate diversification.

Financial planner signature

Date