

Investment Additional investment form

Please complete this form if you wish to make an additional investment to The Portfolio Service Personal Investment Plan or Investment Essentials.

Please indicate which Plan you would like to contribute to:

- Personal Investment Plan
 Investment Essentials

1. Personal details

Investor 1

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"/>

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. Deposit amount (to cash management account)

Deposit information (cheque drawn by)	Amount
	\$
	\$
	\$
TOTAL	\$
IMPLEMENTATION FEE (up to 4%)	%

3. Investment amount

Please list the investment option(s) to be purchased below. You only need to complete this section if you do not use the regular investment sweep and want to invest proceeds in an investment option of your choice. A transaction fee applies when purchasing investment options. There is a minimum of:

- \$1,000 per investment option - Investment Essentials
- \$200 per investment option - Personal Investment Plan

Investment option	Amount
	\$
	\$
	\$
	\$
	\$
TOTAL	\$
Implementation Fee (up to 4%)	%

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

- I/We have read and understood the current offer document or investment report for each investment option I/we have selected or considered.

Signature Investor 1 Date

	/ /
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Signature Investor 2 Date

	/ /
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Financial planner use only

Name

Phone number

AFSL holder

PortfolioNet account number

- The implementation fee applicable to the investment options to be purchased is recorded in section 2 and/or 3 of this form.
- I acknowledge that any liability to pay an adviser service fee (to an AFSL holder approved by the Responsible Entity and stated on this form) will not exceed the amount detailed on this form (except for a GST provision) and that the investor or Responsible Entity may cancel or reduce this amount at any time without notice.
- I indemnify the Responsible Entity against any claim arising pursuant to the advice given by me to the investor(s) named on this form.
- I have given the investor(s) a current offer document and/or investment report for each investment option selected and the current Product Disclosure Statement (for either Investment Essentials or the Personal Investment Plan) 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