

# Investment Reinvestment Plan form

The reinvestment plan gives you the option of nominating to have the income such as dividends, distributions and interest automatically reinvested into the same investment option. Investment options available for reinvestment are identified on the List of Investment Strategies. To change your election, please notify us in writing. Please allow 10 business days for your request to be implemented.

Personal Investment Plan     Investment Essentials

## 1. Personal details

### Investor 1

Title                      Surname    Given names  
                         

Company/Trust name

Address

Suburb/town    State                      Postcode  
                         

Telephone (home)                      Telephone (business)                      Mobile  
                                           

Male      Female      Date of birth (dd/mm/yy)                      Email address  
             /  /                      

ABN                      TFN  
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### Investor 2

Title                      Surname    Given names  
                         

Address

Suburb/town    State                      Postcode  
                         

Telephone (home)                      Telephone (business)                      Mobile  
                                           

Male      Female      Date of birth (dd/mm/yy)                      Email address  
             /  /                      

ABN                      TFN  
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**2. Reinvest income (dividends, distributions and interest)**

Please list the existing investment options that you wish to have the income automatically reinvested.  
 (Please refer to the List of Investment Strategies for availability).


**3. Pay income to my cash management account**

Please pay income to my cash management account for the following investment options.


**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 confirm my acceptance of the terms of the reinvestment plan.
- I/We understand that by signing this form that any income will be reinvested in the investment option(s) or paid to my cash management account as I/we selected until such time as I/we instruct the responsible entity to stop the facility or the facility is terminated or I/we change the options.
- I/We acknowledge that reinvestment can occur before I/we receive a revised offer document for any relevant investment option(s). The responsible entity agrees to give or cause this offer document(s) to be given to me/us as soon as reasonably practicable after the offer document's issue.

Signature Investor 1/director

Date

 /  / 

Signature Investor 2/director/company secretary

Date

 /  / 

#### Financial planner only

Name

Phone number



AFSL holder

PortfolioNet account number



Referring source

Financial institution's BSB number

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- I have given the investor the current Personal Investment Plan or Investment Essentials Product Disclosure Statement or the Product Disclosure Statement/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 options selected are appropriate and provide, when the investment portfolio is taken as a whole, adequate diversification.

Financial planner signature

Date

 /  /