

Additional Investment and Change to Distribution Instructions form

ClearView Managed Investments

Please use this form to make additional investments, start or amend a Regular Savings Plan.
 Fields marked with an asterisk (*) must be completed in order for us to action your request.
 If you need any assistance in completing this form please call our Service Centre on **132 977**.

- *I want to
- Make an additional investment
 - Start or amend a Regular Savings Plan
 - Cancel my existing Regular Savings Plan
(Complete section A and F only)
 - Change my Distribution Instructions

A. Account details

My account number / (e.g. TINV / 100000)

*Title (Investor) Mr Mrs Ms Miss Dr Other *Gender Male Female *Date of birth

*Given name(s) *Surname

*Title (Joint Investor) Mr Mrs Ms Miss Dr Other *Gender Male Female *Date of birth

*Given name(s) *Surname

*Account name (for Company, Trusts or Partnerships)

B. Nominated bank account

- Deposit into my existing linked bank account
- Deposit into the following bank account

Name of Australian financial institution

Address of Australian financial institution

Name of account

BSB number - Account number

Section 2: Money In Choice

Use this section to tell us where you want to invest money coming into your account. You can nominate different instructions for your additional investment and/or Regular Savings Plan.

A. Additional investment

Additional Investment amount \$,

Direct debit (please provide direct debit instructions in section 1B)

OR

Cheque (the cheque must be payable to: ClearView Financial Management Limited)

If you are paying via Cheque, your additional investment will be allocated in accordance with your Default Money In Choice as nominated in your Application Form.

If you are paying by direct debit, your additional investment allocation can be different to your Default Money In Choice. You can choose how you wish to allocate your additional investment by providing your additional investment instructions in the table below.

Investment Option	%
	<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"/> <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"/> . <input type="text"/> <input type="text"/> %
Total additional investment allocation	1 0 0 . 0 0 %

The total allocation must equal 100%.

Note: You can also make additional investments using BPay or TeleAccess.

B. Set up or change a Regular Savings Plan via Direct Debit

If you wish to set up or change a Regular Savings Plan, please nominate the date of payment (allow at least 6 business days).

Next available OR Nominated date OR Not applicable

Frequency

Monthly OR Quarterly OR Not applicable

Regular Savings Plan amount \$,

Please select how you would like your money to be invested

In accordance with my Default Money In Choice OR

In accordance with my instructions in the table below OR

Not applicable

Investment Option	%
	<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"/> <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"/> . <input type="text"/> <input type="text"/> %
Total Regular Savings Plan allocation	1 0 0 . 0 0 %

The total allocation must equal 100%.

Section 3: Distribution instructions

Use this section to tell us where you want your distributions paid. Please ensure you have provided direct debit instructions in section 1B if you want your distributions paid into your nominated financial institution account.

Investment option	Distribution options	
	Reinvest	Paid into nominated account
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Please tick this box if you have provided 3rd party financial institution details (i.e. a financial institution account where you are not listed as an account owner) in section 1B above. By ticking the box you acknowledge and accept that any amount paid into this account is treated as being made to you. If you have included 3rd party account details, please complete an Identification form for each account owner which is available from www.clearview.com.au or from your financial adviser.

Section 4: Declaration Acknowledgement and signature(s)

By signing this form, I/we:

- declare that all the details given in this form are true and correct; and
- declare that, if signing under a power of attorney, I/ we verify that, at the time of signing, I/ we have not received a notice of revocation of that power.

We are committed to handling your personal information and sensitive information in a secure manner and accordance with the Privacy Act 1988 (Cth). For a copy of our Information Handling Policy, please visit www.clearview.com.au.

Full name (print clearly in block letters)

Type of investor

- Individual
 Joint investor 1
 Director 1
 Sole director and sole company secretary
 Trustee 1
 Power of Attorney

Signature of Investor

Date

Full name (print clearly in block letters)

Type of investor

- Joint investor 2
 Director 2
 Trustee 2
 Power of Attorney

Signature of joint investor

Date

Sending your form

Please send the form to us via email or mail.

Mailing address:

ClearView Wealth
GPO Box 4232
Sydney NSW 2001

Email address:

client.wealth@clearview.com.au

If you have any questions or need help please call our Service Centre on **132 977**.