

STEP 3 Switching Instruction

Please indicate which Fund(s) you wish to switch out of and into which Fund(s) you wish your money to be invested.

Name of IOOF WealthBuilder Fund	Switch from my existing Fund(s) (\$ or %)	Switch to the following Fund(s) (\$ or %)	Regular Savings Plan change (if applicable*)
Easy Choice Options			Monthly amount (\$)
Capital Guaranteed Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>
Capital Stable Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fixed Interest Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>
Balanced Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>
Australian Shares Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>
High Growth Fund	<input type="text"/>	<input type="text"/>	<input type="text"/>
Custom Choice Options			Monthly amount (\$)
Australian Shares Fund – MultiMix	<input type="text"/>	<input type="text"/>	<input type="text"/>
International Shares Fund – MultiMix	<input type="text"/>	<input type="text"/>	<input type="text"/>
Smaller Companies Fund – Perennial	<input type="text"/>	<input type="text"/>	<input type="text"/>
High Conviction Shares Fund – Perennial	<input type="text"/>	<input type="text"/>	<input type="text"/>
Global Property Securities Fund – Perennial	<input type="text"/>	<input type="text"/>	<input type="text"/>
Global Shares High Alpha Fund – Perennial	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL	<input type="text"/>	<input type="text"/>	<input type="text"/>
(Must add up to 100%)			

***Important Note:**

- Complete this column if you wish to change your Regular Savings Plan to include/exclude Funds as a result of this switch request. If the value in any Fund is zero as a result of the switch, you **MUST** complete this section.
- **Minimum monthly investment is \$100 per Fund.**
- Contributions net of applicable Contribution Fees will be invested in your nominated IOOF WealthBuilder Fund(s).
- If your financial institution account details have changed, you will need to complete and return the Direct Debit Request Form. This form can be obtained by contacting one of our Client Services Officers on 1800 002 217 or by visiting our website at www.ioof.com.au.

STEP 4 Investor(s) Declaration

I/We wish to switch investments between the IOOF WealthBuilder Funds (the Funds) as nominated in this Switching Instruction Form.

I/We declare that:

- all details in this Switching Instruction Form are true and correct and I/we undertake to inform IOOF of any changes to the information supplied as and when they occur;
- any previously agreed adviser commission instructions will continue to apply to my account in respect of any Fund changes;
- I/we have read the IOOF WealthBuilder PDS in full and agree to the fees and costs applicable in respect of any new Funds included in my account as a result of this switch instruction; and
- I/we consent to the collection, use, storage and disclosure of my/our personal information by IOOF in accordance with the Privacy Act 1988 and acknowledge that a copy of the IOOF Group Privacy Policy is available from www.ioof.com.au or may be obtained by calling one of our Client Services Officers on 1800 002 217.

WHO NEEDS TO SIGN?

All original investors registered on the account must sign this section unless previous authority has been provided in writing and accepted by IOOF, such that:

- a single joint investor can sign on behalf of a joint investor account;
- a representative nominated to act and operate on the account can sign on your behalf*; or
- a Power of Attorney can sign on your behalf,* in which case a certified copy of the Power of Attorney must have been previously provided to IOOF and retained on file for us to process your switch.

* If signed by a nominated representative or Power of Attorney, please ensure that the 'Nominated Representative or Power of Attorney' section in **Step 1** is completed.

Power of Attorney

If signed under a Power of Attorney, the attorney certifies that he/she has not received notice of revocation of that power.

If the Power of Attorney has not previously been registered with IOOF, please attach a certified copy of the Power of Attorney and the required proof of identification documents in accordance with AML/CTF Law. For further information, please refer to the 'Completing Proof of Identity' on our website at www.ioof.com.au, or alternatively call one of our Client Services Officers on 1800 002 217.

Corporate investors

This Switching Instruction Form must be signed either:

- under common seal;
- by the Representative previously nominated for your IOOF WealthBuilder account;
- by two directors or a director and company secretary; or
- by the sole director (where applicable).

