Investment Switch Instruction

About this Form

Use this form to alter fund choices for your existing funds.

Before switching, please make sure you have read the appropriate fund factsheet(s) and are aware of the relevant charges.

Scheme Member's Full Name

IVCM Plan Reference

Investment Switch Instructions

You should insert the name(s) of the fund(s) you want to switch from and the percentage of units you want to switch from each in table 1.

In table 2, insert the name(s) of the fund(s) you want to switch to and percentage of the total amount being switched that you want to allocate to each fund. It's important that your switch into new funds equals 100%.

From (table 1)

Fund Name(s)	Units in fund to be switched (%)

To (table 2)

Fund Name(s)	New allocation (%)
Total	100%

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IVCM (Aust) Pty Ltd
Level 5, 20 Bond Street,
Sydney, NSW 2000,
Australia

When complete email this form to:

qropsdealing@ivcm.com

Adviser Fees

Please indicate the initial and annual fees due to your adviser in relation to the above transactions:

Initial Fee $ _____ or _____ % Annual Fee $ _____ or _____ %

Member Declaration

I understand and agree that neither the Scheme Supervisor, Scheme Manager nor any Investment Manager guarantees the performance of the investment strategy/ies I have selected. I acknowledge that:

- the investment strategy/ies selected will remain in place until I submit a new Investment Switch Instruction Form that is accepted by the Scheme Manager.

☐ I have not obtained financial advice.

OR

☐ I have obtained financial advice from a licensed adviser regarding my investment strategy/ies.

OR

☐ I am acting as an Authorised Representative or Financial Adviser and certify that the member has given a signed authority to the Trustee and this authority has not been withdrawn.

Member's / Authorised Rep / Financial Adviser signature

Date [dd/mm/yy]

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