

# Allocation changes request

INVESTSMART

## Model (Portfolio) allocation changes request

As per the below signature/s, I/we authorise InvestSMART to amend the model allocations of the below SMA/PMA account. I/We have read the PDS and Investment Menu and by signing this I/we note that these instructions are **NOT** based on any advice provided by InvestSMART Financial Services Pty Ltd or its associated companies.

Model (Portfolio) allocation changes request	
SMA/PMA portfolio number	
SMA/PMA portfolio name	

Model (Portfolio) name	New allocation (%)
INV001 – InvestSMART Conservative Portfolio	
INV002 – InvestSMART Balanced Portfolio	
INV003 – InvestSMART Growth Portfolio	
INV004 – InvestSMART High Growth Portfolio	
INV005 – InvestSMART International Equities Portfolio	
INV006 – InvestSMART Diversified Property and Infrastructure Portfolio	
INV007 – InvestSMART Interest Income Portfolio	
INV008 – InvestSMART Hybrid Income Portfolio	
INV010 – InvestSMART Cash Securities Portfolio	
IIF001 – Intelligent Investor Equity Growth Portfolio	
IIF002 – Intelligent Investor Equity Income Portfolio	
<b>TOTAL (%)</b>	<b>100%</b>

_____ Signature of Account Holder 1	_____ Signature of Account Holder 2 (if applicable)
_____ Full Name of Account Holder 1	_____ Full Name of Account Holder 2 (if applicable)
_____ Date	_____ Date

Please return this completed form by email to [invest@investsmart.com.au](mailto:invest@investsmart.com.au). Please note that only requests received **before 2pm AEDT** will be actioned the following business day.

If you need assistance with this form, please contact InvestSMART Financial Services

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