

Allocation Changes Request

INVESTSMART

MODEL ALLOCATION CHANGES REQUEST

Dear InvestSMART,

As per the below signatures, I/we authorise you to amend the model allocations of the below SMA 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 ALLOCATION CHANGES REQUEST

SMA Portfolio Number

SMA Portfolio Name

MODEL CODE / NAME

NEW ALLOCATION (%)

IV0001 – InvestSMART Diversified Income Model

IV0003 – InvestSMART Balanced Model

IV0004 – InvestSMART Growth Model

IV0005 – InvestSMART High Growth Model

IV0006 – InvestSMART International Equities Model

IV0007 – Intelligent Investor Growth Model

IV0008 – Intelligent Investor Equity Income Model

IV0009 – InvestSMART Property Model

IV0010 – InvestSMART Fixed Income Model

IV0102 – InvestSMART Hybrid Income Model

TOTAL (%)

100%

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 complete, scan and email to invest@investsmart.com.au or alternatively complete and mail to
InvestSMART Financial Services Pty Ltd, PO Box 744, QVB, NSW, 1230

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

1300 880 160

9/37 YORK ST,
SYDNEY NSW 2000

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