

Contribution + Model Selection Request

INVESTSMART

ONE-OFF DD CASH CONTRIBUTION WITH MODEL SELECTION

Dear InvestSMART,

As per the below signature, I/we authorize you to conduct a one-off cash contribution via Direct Debit for the SMA listed below. I/We have read the PDS and Investment Menu and by signing this form, I/we acknowledge that InvestSMART will purchase securities on my/our behalf. By signing this form I/we confirm that cleared funds are available to be debited from our nominated bank account. In the event of the direct debit being rejected, I/We acknowledge that any loss occurred from the loss in share value will be my/our responsibility. I/We understand that the contribution will be made via the Default nominated bank account. These instructions are NOT based on any advice provided by InvestSMART Group.

MODEL ALLOCATION CHANGES REQUEST

Total One-off Contribution Amount (\$)	
SMA Portfolio Number	
SMA Portfolio Name	

MODEL CODE / NAME

CASH CONTRIBUTION AMOUNT (MIN. \$5,000 PER MODEL)

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

INVESTSMART.COM.AU