

INVESTSMART

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 (Portfolio) allocation changes request	
Total one-off direct debit contribution amount (\$)	
SMA/PMA portfolio number	
SMA/PMA portfolio name	

Model (Portfolio) name	Contribution amount (min. \$5,000/model)
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	
IIF001 – Intelligent Investor Equity Growth Portfolio	
IIF002 – Intelligent Investor Equity Income Portfolio	
TOTAL (%)	100%

Signature of Account Holder 2 (if applicable)

Full Name of Account Holder 2 (if applicable)

Date _____

Please return this completed form by email to **invest@investsmart.com.au**. If you are unable to email this form, you can mail it to **InvestSMART Financial Services Pty Ltd, PO Box 744, QVB, NSW, 1230** however please note that additional time will be required to action your request.

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