One-off **DIRECT DEBIT** contribution with model selection request

As per the below signature/s, I/we authorise InvestSMART to conduct a one-off cash contribution via direct debit for the SMA/PMA 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 (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 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 note that only requests sent by email and received **before 2pm AEDT** will be actioned the following business day. Requests sent by physical mail may not be actioned within this timeframe due to business requirements or other events.

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.

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

support@investsmart.com.au | 1300 880 160