

ALLOCATION CHANGES REQUEST

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	
IV0004 – InvestSMART 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	
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