

# Update Portfolio/Switch

**Please complete in capital letters only**

This form is to be completed for each Switch transaction or if you wish to update your Portfolio details or alter your investment instructions. Please use a separate form for each Portfolio to be updated.

**1. Account details**

Investor no.	<input type="text"/>
Investor name	<input type="text"/>
Portfolio no.	<input type="text"/> Portfolio name <input type="text"/>

**2. Rebalance option**

Rebalance quarterly  Yes  No

If you select "Yes", you must complete section 3 "New investment instruction" to set your new Portfolio construction.  
 If you select "No", you will need to complete an 'Update Portfolio/Switch' form to re-define your investment percentage mix before you will be able to select automatic rebalance in the future.

**3. New investment instruction**

Strategy	Amount \$ <sup>2</sup>	%	Distribution Election <sup>1</sup>	
			Re-invest	Credit bank account
Absolute Return			<input type="checkbox"/>	<input type="checkbox"/>
Australian Fixed Income (Sovereign)			<input type="checkbox"/>	<input type="checkbox"/>
Australian Fixed Income (Composite)			<input type="checkbox"/>	<input type="checkbox"/>
Australian Equities			<input type="checkbox"/>	<input type="checkbox"/>
Cash			<input type="checkbox"/>	<input type="checkbox"/>
International Fixed Income (Credit)			<input type="checkbox"/>	<input type="checkbox"/>
International Fixed Income (Composite)			<input type="checkbox"/>	<input type="checkbox"/>
International Equities			<input type="checkbox"/>	<input type="checkbox"/>
Listed Property			<input type="checkbox"/>	<input type="checkbox"/>
Structured Bond			<input type="checkbox"/>	<input type="checkbox"/>
<b>Total</b>		<b>100%</b>		

EFT payments should be deposited to Commonwealth Bank Account: 10934719, BSB: 062-000.

<sup>1</sup> We will automatically re-invest your income in units of the same Strategy if you do not make a selection.

<sup>2</sup> Initial minimum application amount of \$500,000 may apply (please refer to page 2 of the 'Fund Information Memorandum' dated 16 October 2006 for details).



#### 4. Banking details

<b>Bank/Building Society or Credit Union details:</b>			
Name of institution			
Name in which the account is held			
Account number	Branch (BSB) number	-	
Street/PO Box no.			
Suburb/Town/City			
State/Territory	Postcode	Country (if outside Australia)	

#### 5. Investor declaration

<b>Note: All Investors must sign and date this section of the form. Corporate applicants should sign under seal (where required).</b>	
<b>Signed on behalf of Signatory 1/Investor 1:</b>	
Full name	
Signed	Date (dd/mm/yyyy)    /    /
<b>Signed on behalf of Signatory 2/Investor 2:</b>	
Full name	
Signed	Date (dd/mm/yyyy)    /    /
<b>Company Seal (if applicable)</b>	

#### Advisor name

Full name	
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#### Where to send this form/enquiries

<b>Responsible entity</b>		
Chifley Financial Services Limited (ABN 75 053 704 706)		
Ground Floor 28 Margaret Street SYDNEY NSW 2000 website: www.chifley.com	GPO Box 2617 SYDNEY NSW 2001	E-mail: Chif.Admin@chifley.com Phone: 1800 800 002 (toll free) (8.30 am – 5.00 pm Mon – Fri) Fax: (02) 9273 0033

