shadforth

10 June 2024

Additional Lump Sum Contribution

Please complete these instructions in BLACK INK using CAPITAL LETTERS and ✓ boxes where provided.

Step 1: Member details

Account number

Title (Dr/Mr/Mrs/Ms/Miss) Surname

Given name(s)

Date of birth / /

Step 2: Contribution payment information

Personal contribution[1]	$
Spouse contribution	$
Downsize contribution[2]	$
Personal Injury Payment[3]	$
CGT small business contribution[3]	$
Total	$

Shadforth Portfolio Service offers you the convenience of BPAY®. To take advantage of this facility, contact Shadforth ClientFirst for details.
If paying by cheque, please make payable to **'Product name' – [your full name or account number]** and return to
Shadforth Portfolio Service, GPO Box 264, Melbourne VIC 3001

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Note: If you wish to vary a Member Advice Fee – Upfront on your account please complete the Advice Fee form, which is available from portfolio.sfg.com.au

1 If you want to claim a tax deduction for your personal contribution, please complete a tax deduction notice which can be obtained from our website or contact Client First.

2 You must provide us with a completed ATO downsizer form before or at the time of making your downsizer contribution. The form is available from our website or by contacting ClientFirst.

3 Please complete the appropriate election form which can be obtained from our website or by contacting ClientFirst.

Step 3: Investment options

Please DO NOT complete this section if this contribution is being invested in accordance with your existing investment strategy. You may nominate a unique investment option for this contribution by placing the required percentage of each investment in the space below and must include at least the default minimum allocation of 1% against the Cash Account. The option selected is for this contribution only. Your existing investment strategy WILL NOT be changed.

Prior to making your selection, the Trustee strongly recommends that you consider obtaining professional advice from a licensed financial adviser. Before making any decisions regarding an investment option, please read the relevant Product Disclosure Statement (PDS), which is available from portfolio.sfg.com.au, by contacting Shadforth ClientFirst or from your licensed financial adviser. Our website provides a detailed list of available investments and underlying investment fees and costs.

Investment code	Investment fund name	Allocation (%)
	Cash Account (Mandatory)	
	Total (must = 100%)	0.00

Please note: You can only include a Separately Managed Account (SMA) Model Portfolio in your investment purchase if you have already acquired that SMA Model Portfolio via your financial adviser.

Step 4: Adviser declaration

I declare that I have given the member the fund PDS and the PDS for the underlying investment managers selected.

Adviser name

Licensee name

Adviser signature

Date / /

Step 5: Member declaration

Important note: The Trustee collects the information in this form in order to process your investment instructions. Any personal information provided in this form will be handled in accordance with the Trustee's privacy policy, available at sfg.com.au/portfolio/privacy. If you do not provide all of the requested information, we may not be able to action your request.

- I consent that where I have chosen an investment with a long withdrawal period (illiquid investments) or there are delays receiving proceeds from selling my investments, any withdrawal or transfer request may be delayed for more than 30 days.
- I confirm I have received and considered the relevant PDS and Target Market Determination (where relevant) for each of the investment options selected.
- I consent to the collection and use of the above information by the Trustee for the purposes specified in the PDS.
- The amount of any member advice fee(s) that are paid to my financial adviser, as agreed by me, will be an additional cost to me and charged against my super account. A Member Advice Fee will not be charged unless I tell the Trustee to do so.
- I understand that any additional super contributions may impact the amount of member advice fee(s) that are charged to my account.

Member signature ______________________ Date ____ / ____ / ________

Please forward all correspondence and enquiries to

Post: Shadforth Portfolio Service
GPO Box 264, Melbourne VIC 8060

Email: portfolioservice@sfg.com.au

Telephone: 1800 931 792

Web: portfolio.sfg.com.au