

Entry Fee Saver Form

Change of Nominated Broker

Nominate to have your existing retail managed funds or Superannuation transferred to Direct Access. You'll save on entry fees and be able to monitor your portfolio with www.directaccess.com.au. Our range of fund managers is continually expanding to offer you greater investment choice.

Complete the details below and return the form to: Direct Access Reply Paid 7030 Sydney NSW 2001

1. YOUR DETAILS

First Name or Company Name

Family Name or Director's Name

Address

Suburb

State

Postcode

Contact Number

Email

2. DETAILS OF YOUR EXISTING INVESTMENTS (please use a separate form for each fund manager)

Name of Fund Manager

Account Name
(Company or trust name if applicable)

Name of Fund

Approx. Value of Investment

Account Reference
(Client Code or Investment Code as advised by your fund manager)

3. SIGNATURES

I/We request that the fund manager named above amend their records to indicate that Personal Investment Direct Access Pty Ltd is the appointed dealer for the listed managed investments. I understand that Personal Investment Direct Access will receive a trailing commission based on my investment amount. I understand that you will apply a 100% rebate on any entry fees in the form of additional units in the relevant fund that would otherwise be charged, both for any ongoing regular contribution and any future contributions I/we may make to the investment.

Name (please print)

Signature

Date

Name (please print)

Signature

Date

