

STEP 5 Investor Declaration and Signature(s)

I/We wish to add to my/our existing investment in IOOF WealthBuilder as detailed in this Additional Investment Form. I/We declare that:

- all details provided in this Additional Investment Form are true and correct and I undertake to inform IOOF of any changes to the information supplied as and when they occur; and
- I/we consent to the collection, use, storage and disclosure of my/our personal information by IOOF in accordance with the Privacy Act 1988 and acknowledge that a copy of the IOOF Group Privacy Policy is available from www.ioof.com.au or may be obtained by calling one of our Client Services Officers on 1800 002 217.

125% Rule

If your additional contribution exceeds the 125% limit and you wish IOOF to process your additional contribution regardless, please tick this box.

- I/We understand, that by ticking this box, I/we acknowledge and accept that the start date of my/our 10 year tax period will be reset to the policy anniversary date in the year in which the excess additional contribution is processed.

WHO NEEDS TO SIGN?

All original investors registered on the account must sign this section unless previous authority has been provided in writing and accepted by IOOF, such that:

- a single joint investor can sign on behalf of a joint investor account;
- a representative nominated to act and operate on the account can sign on your behalf*; or
- a Power of Attorney can sign on your behalf,* in which case a certified copy of the Power of Attorney must have been previously provided to IOOF and retained on file for us to process your additional investment.

* If signed by a nominated representative or Power of Attorney, please ensure that the 'Nominated Representative or Power of Attorney' section in **Step 1** is completed.

Power of Attorney

If signed under a Power of Attorney, the attorney certifies that he/she has not received notice of revocation of that power.

If the Power of Attorney has not previously been registered with IOOF, please attach a certified copy of the Power of Attorney and the required proof of identification documents in accordance with AML/CTF Law. For further information, please refer to the 'Completing Proof of Identity' on our web site at www.ioof.com.au, or alternatively call one of our Client Services Officers on 1800 002 217.

Corporate investors

This Additional Investment Form must be signed either:

- under common seal;
- by the Representative previously nominated for your IOOF WealthBuilder account;
- by two directors or a director and company secretary; or
- by the sole director (where applicable).

→ **Step 5** continued overleaf

