

## Contents and instructions

Please complete this form if you wish to make additional investments to your Generations portfolios.

### Step 1: Client details

Complete the full name in which the investment is held, including client reference number.

### Step 2: Portfolio details

Nominate the portfolio(s) for investment and the dollar amount of your investment.

### Step 3: Contribution details (Personal Super only)

Indicate the type or source of your contribution.

### Step 4: Ad hoc purchase instructions

Complete this section if you would like to nominate an ad hoc investment instruction allocation that will apply only for this investment, otherwise your standing purchase instructions will apply.

Note the following investment minimums apply for each investment option:

- \$50 if you currently invest in the option.
- \$500 if you do not currently invest in the option.

### Step 5: Declaration and signature

The member must sign and date the form

### Step 6: Financial adviser use only

The financial adviser should complete their name, adviser number, and sign and date the form.

Once completed, please send this form to:

Summit Client Service  
GPO Box 2754  
MELBOURNE VIC 3001

If the member has previously requested the Generations fax facility, this form can be faxed to Summit on 1800 780 081.

Refer to the Generations Investment Options Product Disclosure Statement (PDS) for current details of all investment options.

## Step 1: Client details

Client name

 -  - 

Client reference number (eg 0012345-L2-01)

## Step 2: Portfolio details

Generations Personal Super

\$

Total investment to Generations Personal Super

Generations Investment Portfolio

\$

Total investment to Generations Investment Portfolio

Client name

 -  - 

Client reference number (eg 0012345-L2-01)

### Step 3: Contribution details (Personal Super only)

	<b>Total</b>		
Total Rollover	\$		
Personal contributions*	\$		
		<b>Components</b>	
Employer contributions	\$	=	\$
			\$
			\$
Spouse contributions	\$		
Other family and friends contributions	\$		
		The amount cannot be claimed as a tax deduction.	
<b>Total</b>	<b>\$</b>		

If you have standing purchase instructions, all contributions will be invested according to these instructions unless otherwise specified.

\* If you intend to claim a tax deduction for personal superannuation contributions, you must provide the trustee valid notice of your intent to claim the deduction which will be sent to you at the end of each financial year. If the trustee does not receive a valid notice, all personal contributions will be allocated as non-concessional. The trustee is required to acknowledge receipt of the notice and you must have this acknowledgement before you claim a tax deduction.

### Step 4: Ad hoc purchase instructions

Investment option	Product number	\$ value
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<b>Total</b>		<b>\$</b> <input type="text"/>

For a list of current investments, please refer to the latest Generations Investment Options PDS on [summitservice.com.au](http://summitservice.com.au).

### Step 5: Client signature

I/We acknowledge that neither NMMT Limited, nor any other member of the Global AXA Group, guarantees the performance of the investments that have been chosen, and does not express any opinion as to the appropriateness of any particular investment in relation to the individual circumstances of any member.

I/We acknowledge that where I/we have invested in a illiquid investment option, any withdrawal or transfer which required the sale of all or part of this investment may be processed in a period longer than 30 days.

<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Client one signature		Date
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Client two signature		Date

### Step 6: Financial adviser use only

Adviser name

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Adviser number