



# Purchase request

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Client reference number (eg 0013102-D2-01)

## STEP 2: INVESTMENT PURCHASE

### Investment option purchases

1. Your cash account cannot be nominated as an investment to purchase.
2. If the amount available for purchase is less than your investment instructions, we will apportion the purchase instructions in accordance with the adjusted investment amount.

Investment name	Product no.	\$ 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"/>
<b>Total</b>		\$ <input type="text"/>

### Listed security purchases

1. Unless otherwise instructed, share trades will be placed at market prices.
2. Share trade instructions received up to 2 pm on any business day will be actioned that day. Instructions received after 2 pm may be actioned the following day.

### The following portfolio restrictions apply to members of Summit Personal Super and Personal Pension plans at the time of purchase:

- direct securities must be in the S&P/ASX 300
- hybrid securities must be attached to a listed share in the S&P/ASX 300
- Initial Public Offerings (IPO) for listed shares or equivalent securities, which meet NM Super's eligibility requirements.
- all fixed interest securities with a minimum Standard & Poor's rating of BBB.

All listed property trusts, all listed investment companies, all exchange traded funds (ETFs) and all exchange traded commodities (ETCs) are available for investment.

Refer to the Fund's product disclosure statement for further information.

ASX code	Security name	\$ value	Number of shares	Price limit per share
<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"/>	<input type="text"/>	\$ <input type="text"/>	<input type="text"/>	\$ <input type="text"/>
<b>Total</b>		\$ <input type="text"/>		

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Summit's default broker for executing trades is Australian Investment Exchange (Ausix). Alternatively, you can have your trades executed by any broker on the Summit panel of brokers, if your shares are held in custody. Shares can only be held in the name of the individual in the Money Master account.

## Listed securities purchase/sales cost

When purchasing listed securities, additional costs (that are not costs imposed by Summit) will be incurred. These costs, which include brokerage, will be directly debited from your account or Summit individual holding. The cost per transaction varies between brokers and is subject to change.

### How do you want to hold and execute your shares? (Please select)

Custodial holding – Ausix (Default)

Custodial holding – panel broker

Individual holding – adviser to execute (Summit Money Master only)

Individual holding – NMMT to execute (Summit Money Master only)

Nominate broker

Ausix account number (existing client)

Ausix account number (existing client)

*Note: If you intend to hold securities in your own name (Individual holding) you will need to complete the Ausix New Client form and the Summit Direct Credit of Dividends form, both of which are available from your Financial Adviser.*

## Term deposits

You can select from one or more of the listed term deposit providers.

### Term deposit information:

- The minimum term deposit amount is \$5,000 per provider
- When you do not elect to reinvest principal and/or interest, proceeds from maturing term deposits will be paid into the cash account and invested in line with any existing standing instructions. If the standing instructions are not to apply to a maturing term deposit, you will need to submit alternative standing instructions for the portfolio prior to the maturity date.
- If reinvestment is selected, we will continue to reinvest per your original instruction until otherwise notified. The interest rate at the point of reinvestment may differ from the original rate.

Please select the provider, amount, term, interest payment frequency, reinvest option and Government guarantee (if applicable).

### Adelaide Bank

Government guaranteed term deposit  
(Please tick for Government guarantee)

amount of term deposit guaranteed

Amount  
(\$5,000 minimum)

Term (30, 90, 180 days or less than 1 year)

Interest payment frequency  
(at maturity only)

Reinvest  
principal only

**OR** Reinvest  
principal and interest





Amount  
(\$5,000 minimum)

Term greater than 1 year and up to 5 years

Interest payment frequency  
(M, Q, 1/2 year, yearly or  
at maturity)

Reinvest  
principal only

**OR** Reinvest  
principal and interest






### ANZ

Government guaranteed term deposit  
(Please tick for Government guarantee)

amount of term deposit guaranteed

Amount  
(\$5,000 minimum)

Term (30, 90, 180 days or 1, 2, 3, 4, 5 years)

Interest payment frequency  
(at maturity or yearly for terms  
greater than 1 year)

Reinvest  
principal only

**OR** Reinvest  
principal and interest

# Purchase request

## Westpac

- The Government guarantee is currently unavailable to superannuation and pension members for Westpac term deposits.
- For Summit IDPS (non-super) investors, the Government guarantee will automatically apply without charge for the first \$1 million. The Government guarantee is not currently available for amounts over \$1 million.

Amount (\$5,000 minimum)	Term (30, 90, 180 days or 1, 2 years)	Interest payment frequency (at maturity or yearly for terms greater than 1 year)	Reinvest principal only	<b>OR</b>	Reinvest principal and interest
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>		<input type="checkbox"/>

Please note: Proceeds from maturing term deposits will be paid into the cash account and invested in line with any existing standing instructions. If the standing instructions are not to apply to a maturing term deposit, you will need to review the standing instructions on the portfolio prior to the maturity date.

### STEP 3: DECLARATION

I/We acknowledge that neither N.M. Superannuation Pty Ltd, NMMT Limited, nor any other member of the Global AXA Group guarantee the performance of the investments that have been chosen, and do not express any opinion as to the appropriateness of any particular investment in the circumstances of any particular member.

I/We confirm that I/we relied on my/our own investigations and the advice of my/our financial adviser in choosing the investments. I/We have also been provided with current product disclosure statements and any supplementary information on the underlying investment recommendations and a written recommendation from my/our financial adviser. I/We therefore ask that Summit action these investment instructions.

<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 (if applicable)		Date

### Financial adviser use only

<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"/>
Adviser name	Adviser number												