

# INVESTORS MUTUAL

ABN 14 078 030 752 | AFSL 229988

## Switch Form

Use this Form to switch between the Investors Mutual Funds (“Funds”). A minimum value of \$50,000 is required to keep your investment in a Fund open.

Prior to completing this Form, please consider the current Product Disclosure Statement, Target Market Determination and Investment Guide, where applicable, which can be found at our website [iml.com.au](http://iml.com.au). If you do not have an existing holding in the IML Fund that you are switching into, you will need to complete an Application Form for that Fund. If you have previously supplied IML with identification documentation for AML/CTF purposes you do not need to provide them again. Switching between Funds may also give rise to tax consequences and it is recommended that you check the tax implications with your tax adviser before switching.

If you have questions about completing this form please contact Investors Mutual Limited (“IML”) on 1300 551 132.

## 1. Unit Holder Details

Account name (in full)

Investor No

Contact Number

## 2. Switch instructions

Please Withdraw

All Units

OR

The following number of units:

OR

A\$ amount

\$

Please indicate the fund you will be switching from and switching to

### From the following Fund:

- Investors Mutual Australian Share Fund
- Investors Mutual Equity Income Fund
- Investors Mutual All Industrials Share Fund
- Investors Mutual Concentrated Australian Share Fund
- Investors Mutual Small Cap Fund
- Investors Mutual Future Leaders Fund
- Investors Mutual Australian Smaller Companies Fund
- Investors Mutual Private Portfolio Fund
- Investors Mutual Private Portfolio Fund Class B Units
- IML Sustainable Future Fund

### And apply the proceeds to this Fund:

- Investors Mutual Australian Share Fund
- Investors Mutual Equity Income Fund
- Investors Mutual All Industrials Share Fund
- Investors Mutual Concentrated Australian Share Fund
- Investors Mutual Small Cap Fund
- Investors Mutual Future Leaders Fund
- Investors Mutual Australian Smaller Companies Fund
- Investors Mutual Private Portfolio Fund
- Investors Mutual Private Portfolio Fund Class B Units
- IML Sustainable Future Fund

### 3. Declaration

Signatures must match the signing authority on this account. If signed under a Power of Attorney, the attorney declares that he/she has not received any notice of revocation of that power or the death or mental incapacity of the Investor. A certified copy of the Power of Attorney must be submitted with this Form unless we have previously sighted it. If executed by a company, the Form must be executed in accordance with the company's constitution or the Corporations Act 2001 by an authorised officer or attorney who has not received notice of any revocation.

### 4. Signatures

I/we have received, read and understood the PDS, Target Market Determination and Investment Guide for the Fund to which my/our investment relates (as may be updated from time to time) and agree to be bound by the terms of the PDS, Investment Guide and by the constitution of the Fund (as amended from time to time).

Applicant 1 Signature	Date
<input type="text"/>	<input type="text"/>
Applicant 2 Signature	Date
<input type="text"/>	<input type="text"/>

### 5. Send Your Completed Instruction To:

A request for a switch must be received **before 4.00pm Sydney Time** on a business day in Sydney, NSW Australia in order to be processed with the unit price calculated for that day. A buy/sell spread will apply to the switch. Investors Mutual Limited will not be responsible for any service delivery delay or failure including failure of postal delivery.

Send your completed form to:

Investors Mutual Limited  
C/- Citi Unit Registry Australia  
GPO Box 764  
Melbourne VIC 3001

Fax 1300 714 616