

Save on future fees

Nominate 2020 DIRECTINVEST as your fund broker on your existing managed and superannuation fund investments and save on entry fees - 2020 DIRECTINVEST will rebate 100% of all entry fees on all future investments including monthly direct debits. See overleaf for more information

To start saving, please complete and return this form via

Fax 02 8273 2010 or

Post 2020 DIRECTINVEST, Reply Paid 85514, Sydney NSW 2000

Your details

First Name/Company Name				
Family Name / Director's Name				
Street Address				
Suburb		State		Postcode
Contact Phone Number				
Email Address				

Details of existing investments

(This information is generally found on the statements you receive from the fund manager)

Fund Manager Name (eg. Macquarie)	Account Name (eg. John Citizen)	Account Reference or Investor Number	Approximate value of Investment (\$)

Signatures

I/We request that the Fund Manager named above amend their records to indicate that 2020 DIRECTINVEST is the appointed dealer for the listed managed investments. I/We understand 2020 DIRECTINVEST will receive a trailing commission (paid by the fund manager and is not an additional charge to me) based on my investment amount. I/ We 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.

Signature

Signature

Print name

Print name

Date

Date

100% entry fee rebate
Change your broker
NOT YOUR INVESTMENT



100% entry fee rebate on existing investments

2020 DIRECTINVEST offer a full rebate of all future entry fees on your existing investments including any regular monthly investments. In addition, if you have invested through a financial adviser, we will immediately cancel any adviser service fees you currently pay.

Change your broker, not your investment

There's no need to change your investment - we'll have the fund manager code your account for a full rebate of all future entry fees.

How does it work?

1. Complete the one page form overleaf
2. Fax or post to our office

Getting started

To complete the form overleaf, you will need the following information. You can generally find this information on the statements you receive from your fund manager.

- The **fund manager** the account is held with
- The **name** the account is held in
- The **account number** the fund manager issued you.

This form can be used for:

- Managed investments
- Superannuation & pension
- Cash management trusts
- Margin loans

Entry fee rebates are available on all major Australian fund managers, including:

- Advance
- AMP
- Australian Ethical
- Australian Unity
- BlackRock
- BT
- Challenger
- Colonial First State
- Hunter Hall
- ING
- IOOF
- Macquarie
- MLC
- Perpetual
- Zurich

...and more

Important Information

2020 DIRECTINVEST (2020) rebates 100% of all entry fees that would otherwise be paid to 2020 as an upfront commission. The rebate is by way of additional units in the fund.

As your nominated broker, 2020 may receive trailing commissions from the fund manager. They are calculated as a percentage of the funds you have invested and paid by the fund manager out of the revenue they earn and is not an additional charge to the investor. Trailing commissions generally range between 0.2%-0.6% pa.

In preparing this form, 2020 has not taken into account your particular objectives, financial situation and needs. You should consider whether it is appropriate in light of your particular financial circumstances before making an investment decision.

2020 DIRECTINVEST

Level 18, 1 Macquarie Place
Sydney NSW 2000

T 1800 352 021
F 02 8273 2010

E info@2020directinvest.com.au
W www.2020directinvest.com.au

ABN 89 069 774 456
AFSL 244249