

5 October 2021

Product Update

Additional information for the Investor Directed Portfolio Service Guide (Offer Document) dated 1 July 2021 for:

- **Shadforth Portfolio Service – Investment**

The following features and information apply to members from 5 October 2021.

Applications for Companies

From 25 October, companies will be able to open an account in Shadforth Portfolio Service – Investment only via a financial adviser using our online application form.¹

Corporate Action Participation

Where your financial adviser has provided you access or you don't have a financial adviser you will now be able to participate in approved Corporate Actions through Shadforth Portfolio Online. Where relevant you will receive notifications to participate through your preferred communication method.

Income Instruction – Percentage

A minimum buy of \$1 has been introduced where you have elected to have 'Income Instruction – percentage' as your income preference. Where your purchase would be less than \$1, the percentage of your deposit that you allocated to invest in that managed investment will be retained in the Cash Account.

At Limit Trades

From 6 December, you and/or your financial adviser will be able to buy and sell listed investments at the specified price (known as 'at limit'). Trades will remain in the market for 20 trading days unless filled, cancelled at your instruction or cancelled by the Australian Stock Exchange (ASX).

¹ Existing restrictions to online applications apply