Fact sheet

Portfoliofocus
It's easy to contribute

Additional contributions

With Portfoliofocus, it's easy to invest simply and conveniently. Choose from one of these five easy options to make additional contributions.

Payment Options

1. BPAY®

To make additional payments via BPAY®, the BPAY® Biller Code for the account needs to be entered. These codes are:

Account	Biller code
Portfoliofocus – Premium Investment Service Series 2 and Portfoliofocus – Premium Investment Service	514497
Portfoliofocus – Premium Retirement Service Series 2 and Portfoliofocus – Premium Retirement Service	514497

When making any BPAY® contributions you need to include the **Customer Reference Number**. This is the **Contribution code plus your Porfoliofocus BPAY® Reference Number**.

The **Contribution code** is dependent on the contribution type as follows:

Superannuation

Contribution type	Contribution code
Portfoliofocus – Premium Retirement Service Series 2 and Portfoliofocus – Premium Retirement Service	
Employer: Superannuation Guarantee Salary Sacrifice Employer Additional	11
Personal	13
Spouse	15

Investment

Contribution type	Contribution code
Portfoliofocus – Premium Investment Service Series 2 and Portfoliofocus – Premium Investment Service	
Additional investment	44

Your Portfoliofocus **BPAY® Reference Number** can be found:

- on your account statement
- by logging onto **investinfo.com.au/portfoliofocus** and view personal information, or
- calling Portfoliofocus Client Services on **1300 769 613**.

For example, if you are making a personal contribution into your Portfoliofocus Superannuation account and your Portfoliofocus BPAY® Reference Number is 1111100001, then the Customer Reference number would be entered as 131111100001.

2. Electronic Funds Transfer (EFT)

To make additional payments via EFT, you'll need the following:

1. your unique EFT identification number, and
2. our NAB account details.

You can register to get these details at **investinfo.com.au/portfoliofocus**

If you have previously registered and can't remember your details, simply speak to your financial adviser or call us on **1300 769 613** to reconfirm your details.

3. Direct debit

To make additional payments via direct debit, you can:

1. speak with your financial adviser, or
2. complete an **Additional/regular investments** form available on **investinfo.com.au/portfoliofocus**

Completed forms should be sent to:

Portfoliofocus Client Services
GPO Box 1274
MELBOURNE VIC 3001

4. Cheque

Cheques need to be made payable to:

- the relevant product name (eg Portfoliofocus – Premium Retirement Service)

In addition, an **Additional/regular investments** form needs to be completed. This can be downloaded from **investinfo.com.au/portfoliofocus**

Cheques and completed forms should be sent to:

Portfoliofocus Client Services
GPO Box 1274
MELBOURNE VIC 3001

5. Asset (in-specie) transfers

You can contribute using investments or shares that you own.

Speak with your financial adviser to make sure the investment you wish to transfer in can be added to your Portfoliofocus account.

If the investment is available, you need to complete the relevant **In-specie transfer** form available on **investinfo.com.au/portfoliofocus** and send it to us.

Completed forms should be sent to:

Portfoliofocus Client Services
GPO Box 1274
MELBOURNE VIC 3001

Note:

All deposits received will be allocated as per your Additional Investment Facility, unless specified otherwise.

If you do not have an Additional Investment Facility in place, the deposit will be allocated to your Cash Account.

Investment instructions for future deposits can be provided by speaking with your financial adviser or nominating your instructions on an **Additional/ regular investments** form.

Incomplete or inaccurate information may lead to delays in allocating your deposit to your account.

Any questions?

For more information speak with your financial adviser or contact us on **1300 769 613** Monday to Friday between 8 am and 6 pm (AEST/AEDT) or visit **investinfo.com.au/portfoliofocus**

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