

PORTFOLIO REQUEST FORM

To: Select Equities
Attention: Danny Goldberg & Mark Southwell-Keely
Fax: (02) 9232 1933
Phone: (02) 9232 1833

Adviser Name:

(Please print clearly and use capitals) _____

Adviser's Company:

(Please print clearly and use capitals) _____

Adviser's Contact Details:

(Please print clearly and use capitals) Phone: _____ Fax: _____ Email: _____

Client Details

Client has a SE account: y/n if no, please attach new account form & client i.d (photocopy of Drivers Lic.)

Client Name:

(Please print clearly and use capitals) Title: _____ Given Name(s): _____ Surname: _____

Company: _____ Date of birth: _____

Client Registered Address:

(Please print clearly and use capitals) _____

State: _____ Postcode: _____

Investment Criteria**A. What is the client's investor profile?**

Very Defensive Defensive Balanced Growth High Growth

B. What is the client interested in ?

Blue chips Growth companies Income Value Small companies
 Speculative opportunities Turn Around opportunities

Please tick one or more**C. Client(s) Financial position ?**

\$0-\$20k \$20k-\$50k \$50k-\$100k \$100k-\$150k \$150-\$200k
 \$200k-\$300k \$300k-\$400k \$400k-\$500k \$500k +

Please tick one**D. Client(s) Annual Income?**

\$0-\$20k \$20k-\$50k \$50k-\$100k \$100k-\$150k \$150-\$200k
 \$200k-\$300k \$300k-\$400k \$400k-\$500k \$500k +

Please tick one**E. Share Portfolio Account Type?**

Personal Company Superannuation Trust

Please tick one**F. Investment capital**

A\$ _____

Please complete and fax to Select Equities on (02) 9232 1933. A Select Equities Portfolio ("Portfolio") will be prepared by Select Equities in accordance with the limited information provided by the client's financial adviser ("Adviser") and will contain general securities advice only. Select Equities does not take into account any other investment objectives, financial situation or particular needs of the client when preparing the Portfolio recommendation. Both the Adviser and client will need to consider whether the Portfolio recommendation is appropriate in light of the client's particular investment needs, objectives and financial circumstances before making an investment decision on the basis of this Portfolio recommendation.

Please attach details of current share holdings and any other relevant information

Adviser's Signature: _____ Date: _____