27 February 2026

Withdrawal Form

Investment

Please complete these instructions in BLACK INK using CAPITAL LETTERS and ✓ boxes where provided.

Step 1: Client details

Account number

Account name

Date of birth (if applicable) / /

Step 2: Withdrawal instructions

☐ Full withdrawal (Please proceed to Step 3)

OR

☐ Partial withdrawal

Please specify amount $

Please note: Any asset sales associated with your withdrawal will be done in accordance with your existing tax optimisation method. To view and update your chosen method, please speak to your financial adviser or log in to Cornerstone Portfolio Online.

Partial withdrawals only – specific investment options to be redeemed (optional)

If you do not select the investment options to be redeemed, your withdrawal will be processed using the available cash in the Cash Account. If there is insufficient available cash, your investments will be redeemed on the basis of your existing nominated Cash Account top-up method.

If you would like to provide specific instructions, please select one of the following options:

Proportionally across managed investments and cash ☐ Please go to **Step 3**

From specific investment options ☐ Please complete the below table

Investment fund name	Amount (Minimum $500 per listed investment)
	$
	$
	$
	$
	$
	$

Note: Partial withdrawals must be for $100 or more.

Step 3: Financial institution details

☐ Please pay the withdrawal to my nominated financial institution.

OR

☐ Please pay the withdrawal to the following financial institution details:

Name of financial institution

Account name

BSB – Account number

☐ I want to update my nominated financial institution with the above details for all future withdrawals.

Note:

- If withdrawing to a new bank account and there are multiple signatories (for example joint accounts or accounts with multiple trustees), all signatories are required to sign in Step 4.
- Ensure your account details are correct as we will not be liable for mistaken payments based on incorrect details.

Step 4: Client declaration and signature(s)

Important note: The Service Operator collects the information in this form in order to process your investment instructions. Any personal information provided in this form will be handled in accordance with the Service Operator's privacy policy, available at cornerstoneportfolioservice.com.au/privacy.

By signing this request form I am/we are making the following statements:

- I/We declare I/we have fully read this form and the information completed is true and correct.
- I/We understand that all investment options will be converted to cash prior to transferring out of this account.

Please note: If this form is signed under a Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this form unless we have already received it). You generally cannot sign under a Power of Attorney if acting on behalf on entity.

Signature

Signatory 1 Date / /

Role (such as Investor/Director/ Trustee as applicable)

Full name

Additional signatures (if required)

Signatory 2 Date / /

Role (such as Investor/Director/ Trustee as applicable)

Full name

Signatory 3 Date / /

Role (such as Investor/Director/ Trustee as applicable)

Full name

Signatory 4 | Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Signatory 5 | Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Signatory 6 | Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Common seal (of company) if required

Scam awareness

Scammers are becoming more sophisticated, often creating convincing stories to steal your money and personal information. Stay vigilant, especially when busy or distracted as this can make it harder to spot red flags.

Key reminders to recognise scams:

Stop and reflect: Before responding to unexpected messages or offers, take a moment to assess. Scammers often create urgency to prompt quick decisions.

Verify the source: Double-check the validity of communications from trusted sources. Look for inconsistencies or ask questions only the legitimate source would know.

Beware of too-good-to-be-true offers: If something seems too good to be true, it likely is. Approach unbelievable deals with scepticism.

Recognise red flags: Be cautious of unsolicited requests for personal information, payment, or immediate action.

Visit ioof.com.au/cyber-security for more information and helpful links.

Please forward all correspondence and enquiries to

Post: Cornerstone Portfolio Service
GPO Box 264, Melbourne VIC 3001

Email: clients@cornerstoneportfolioservice.com.au

Telephone: 1800 947 974

Web: cornerstoneportfolioservice.com.au

SR-7 (SR-69) 0226