

myPerpetual FAQs

Investor

How do I set up my access or change my access level?

- Register for myPerpetual access via perpetual.com.au/login
- Click on "Register as a new user for myPerpetual"
- Provide your client number and email that is linked to your account for verification (your client number is a nine-digit number that can be found in the top right-hand corner on any statement or letter we send to you)
- A temporary password will be sent to your registered email address on successful verification.

Note: Your account level access on myPerpetual may be set up as either transact or view only. Please contact us if you do not have an email registered or if you wish to update your access level.

I have multiple accounts and client numbers, which one do I use?

Where you have multiple client numbers you will need to use each client number associated with each account to access myPerpetual.

What do I do if I have forgotten my password?

Simply click on "Reset Password" on the myPerpetual login screen and enter in your credentials. A temporary password will be sent to your registered email address.

Who do I call for help?

Please contact us on 1800 022 033 during business hours (Sydney time) and we will be able to assist you.

What transactions can I complete online?

If you have transaction access, you can complete the following transactions online in myPerpetual:

- Investments – additional and regular contributions
- Switches
- Withdrawals and regular withdrawals
- Updates to investment strategy
- Update personal details including home phone, email, and address
- Maintain distribution method for your investments
- Manage pension payments
- Add new bank account or make existing bank account inactive
- Nominating a non-binding beneficiary.

Are my transactions effective in real time?

Most requests will be in real time and take effect immediately such as updates to investment strategy, email and home phone number changes etc. However, transactions such as a switch, investment or withdrawal submitted online will generally be in a pending status waiting on the applicable price for your selected fund(s). These transactions will appear in priced status in 3-5 business days.

Is there a difference between doing a transaction online or via form?

All transactions received whether it be by form or online will be processed effective of the date of receipt – so long as the request is received by 3pm (Sydney time) that day the transaction will be processed with the effective date of that day. Where it is received after 3pm (Sydney time) the following days unit pricing will be used.

What is the cut off time for online transaction requests?

3pm (Sydney time)

What is the maximum/minimum I can withdraw?

There are no withdrawal maximums, however some transactions may take longer to process where the amount is high. Refer to your PDS for your product rules on withdrawal minimums.

Once I update my investment strategy will that take effect immediately?

Investment strategy will take effect immediately for all future investments allocation for any additional investments made after the date the investment strategy has been elected.

Will my adviser be able to update my bank account details?

Your Adviser is only able to view your bank accounts and will not be able to add or make any changes to your bank accounts. This applies even if your Adviser has been authorised transaction access on your account.

Will I get notified when the transaction is complete?

You will receive a confirmation when the transaction is initiated via SMS and email provided your details are recorded in the system.

Is the email/SMS I received confirming my transaction or just a receipt of receiving the request as it's not showing online as yet?

We send SMS and email to confirm the receipt of transactions. Please check again to see if the transaction is now processed and showing in myPerpetual in pending or priced status.

Why can't I see the fund I want to transact on?

If you cannot see the investment you wish to transact on please contact us for assistance.

What is the difference between non-binding and binding beneficiary nomination?

A non-binding nomination gives the Trustee an indication of your wishes to whom a superannuation death benefit is paid. However, it doesn't necessarily mean that the benefit will be distributed this way.

A binding nomination binds the Trustee to make payment of your death benefit according to your instructions, provided your nomination is valid under the law and the rules in the Trust Deed.

Binding nominations may be either:

- lapsing – valid for three years after it is signed.
- non-lapsing – remains valid unless your cancel or update it.

When will you have a mobile application to access details?

We do not have any immediate plans for a mobile application however you can access myPerpetual via your web browser on your mobile device. The website will adjust its size to be compatible with all mobile devices and tablets.

More information

Contact your financial adviser or call 1800 022 033.

Email: investments@perpetual.com.au
perpetual.com.au

Trust is earned.

Perpetual 