

***PR 2021/3A2 - Addendum - Income tax: taxation consequences of changing the portfolio structure, contributing to and partially redeeming an investment in a unit in the Perpetual WealthFocus Investment Advantage Fund - 2021***

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⚠ View the [consolidated version](#) for this notice.



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# Addendum

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## Product Ruling

### Income tax: taxation consequences of changing the portfolio structure, contributing to and partially redeeming an investment in a unit in the Perpetual WealthFocus Investment Advantage Fund – 2021

This Addendum is a public ruling for the purposes of the *Taxation Administration Act 1953*. It amends Product Ruling PR 2021/3 to incorporate new scheme documents.

PR 2021/3 is amended as follows:

#### 1. Paragraph 16

Omit all dot points; substitute:

- application for a Product Ruling as constituted by documents and information received from Perpetual Investment Management Limited (PIML) on 2 March 2021, 11 October 2022 and 22 December 2023
- Perpetual WealthFocus Investment Advantage Product Disclosure Statements dated 1 December 2020, 1 October 2022 and 18 December 2023
- Perpetual WealthFocus Investment Advantage Features Books dated 1 December 2020, 1 October 2022 and 18 December 2023
- Perpetual WealthFocus Investment Books dated 1 December 2020, 1 October 2022 and 18 December 2023, and
- Consolidated Constitution to the Perpetual WealthFocus Investment Advantage Fund dated 11 February 2021 and Amending Deeds dated 24 June 2021 and 8 December 2021.

This Addendum applies both before and after its date of issue.

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**Commissioner of Taxation**  
6 March 2024

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ATO references

NO: 1-10OU1BCJ  
ISSN: 2205-6114  
BSL: PW

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