

***PR 2018/4A2 - 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***

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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

This Addendum is a public ruling for the purposes of the *Taxation Administration Act 1953*. It amends Product Ruling PR 2018/4 to incorporate new scheme documents.

PR 2018/4 is amended as follows:

#### 1. Paragraph 16

Omit all bullet points; substitute:

- application for a Product Ruling as constituted by documents and information received from Perpetual Investment Management Limited (PIML) on 2 February 2018, 22 February 2019 and 27 November 2020
- Perpetual WealthFocus Investment Advantage Product Disclosure Statements dated 1 May 2017, 1 March 2019 and 1 December 2020
- Perpetual WealthFocus Wholesale Investment Advantage Product Disclosure Statement dated 1 May 2017
- Perpetual WealthFocus Investment Advantage Features Books dated 1 May 2017, 1 March 2019 and 1 December 2020
- Perpetual WealthFocus Wholesale Investment Advantage Features Book dated 1 May 2017
- Perpetual WealthFocus Investment Books dated 1 May 2017, 1 March 2019 and 1 December 2020, and
- Consolidated Constitution to the Perpetual WealthFocus Investment Advantage Fund dated 21 June 2017.

This Addendum applies before and after the date of issue.

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**Commissioner of Taxation**  
27 January 2021

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ATO references

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