

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

⚠ This cover sheet is provided for information only. It does not form part of *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*

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



Addendum

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.

Commissioner of Taxation
6 March 2024

ATO references

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

© AUSTRALIAN TAXATION OFFICE FOR THE COMMONWEALTH OF AUSTRALIA

You are free to copy, adapt, modify, transmit and distribute this material as you wish (but not in any way that suggests the ATO or the Commonwealth endorses you or any of your services or products).