


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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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

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.

Commissioner of Taxation
27 January 2021

ATO references

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ATOlaw topic: Income tax ~~ Financial arrangements ~~ Other

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