

# Register of significant event notification – ClearView WealthSolutions sub-plan



ClearView WealthSolutions Superannuation and Retirement Income, USI 45 828 721 007 001  
Issued by ClearView Life Nominees Pty Limited ABN 37 003 682 175 AFSL 227683  
as trustee for the ClearView Retirement Plan ABN 45 828 721 007

Notice date	Nature of event or change
31 May 2017	<b>From 1 July 2017:</b> New website update document, including a range of super tax reform changes impacting contributions, transition to retirement pensions and retirement income streams.
1 July 2016	<b>From 1 July 2016:</b> New website update document, including: <ul style="list-style-type: none"> <li>• Introduction of selected annuities available via the platform</li> <li>• Changes to investment strategy classifications</li> </ul>
31 Aug 2015	<b>From 1 Oct 2015:</b> New Product Disclosure Statement and associated documents issued, including: <ul style="list-style-type: none"> <li>• Changes to Administration Fees, including reduced rates and removal of the minimum monthly fee</li> <li>• Changes to fees linked to an Investment Portfolio Service (IPS) Model, including removal of the Administration Fee Discount and changing the Investment Fee rate and from a flat fee to a tiered fee</li> <li>• Flexibility in upfront and ongoing Adviser Service Fees (ASFs) introduced, including ability to make fees percentage and/or dollar based and with no cap on upfront ASFs</li> <li>• Ongoing Dealer Service Fee introduction which can be structured as a percentage or dollar based fee or a combination of both</li> <li>• Service Fee introduction with limited member functionality if members choose to remove their financial adviser</li> <li>• Update of the Investment Portfolio Service (IPS) Models, including changes to IPS Model names and underlying investment allocations, removal of the Cash Hub from the IPS Models allocations and regular rebalance review frequency changed to quarterly</li> <li>• Introduction of regular sell facility</li> <li>• Introduction of ability to update reversionary nominations without restarting pension</li> <li>• Change to not accepting any transfers from UK pension funds</li> </ul>