

AdviserNET login access request



Please complete this form to setup or amend AdviserNET access.

Complete this form in **BLOCK LETTERS** and send it to us by either:

- email: useraccess@asgard.com.au
- mail: Asgard – PO Box 7241, Cloisters Square WA 6850

Questions? Call Online Services on 1800 060 802

Note:

- Privacy laws protect your privacy. Please read our Privacy Brochure, for more information. A copy can be obtained from our website at www.asgard.com.au

Checklist

- Complete all relevant sections, sign and date this form.
- Please ensure the request has been signed by the relevant authorised person.
- Attach a copy of the Photo ID such as driver's licence or passport (relevant to the individual under this application).

1. Your details

Title	Surname
<input type="text"/>	<input type="text"/>
Given name(s)	Date of birth
<input type="text"/>	<input type="text"/>
Position held	
<input type="text"/>	
Business trading name	
<input type="text"/>	
Email	
<input type="text"/>	
Phone (Home)	Phone (Business)
<input type="text"/>	<input type="text"/>

2. Setup new access

Your AdviserNET access details

Preferred user name: (up to 8 letters and/or digits e.g. john123 – subject to availability)

Access level required:

- Adviser access Adviser Code (BA) -BA-01
- Office access Office Code (BO) -BO-01
- Dealer access Dealer Code (BD) -BD-01

Note:

- The relevant Adviser, Office or Dealer code must be completed
- You may select more than one option

i • Section 4 must be signed by the appropriate party.

User access administration rights

Authority to modify/delete user access and settings: Yes No

Note: Where a user is granted access to modify/delete user access and settings, that user will be able to modify other users' transaction permissions and delete their access to AdviserNET.

Additional access

Full name	Position	User name subject to availability (up to 8 letters or digits)	Phone number	Email address	Access required: Adviser (BA) Office (BO) Dealer (BD)	Relevant code	Authority to modify/delete user access and settings	Authorised by (must be signed by relevant authority)	Name of person authorising	Position of the authorised signatory
John Smith	Adviser assistant	john123	02 9999 9999	john@myweb.com	Adviser (BA)	9999999 –BA- 01	Yes	Signature	James Jones	Director

3. Amend/remove existing access

Complete the following sections to change or remove existing user’s access.

Change of access level

Please change the following user(s) access level.

Full name	User name	Relevant code	Access required: Adviser(BA) Office (BO) Dealer (BD)	Authority to modify/delete user access and settings	Authorised by (must be signed by relevant authority)	Full name of person authorising the request	Position of the authorised signatory
John Smith	john123	9999999 –BA- 01	Office (BO)	Yes	Signature	James Jones	Director

Remove user(s)

The following user(s) are no longer authorised. Please revoke their access.

Full name	User name	Relevant code
John Smith	john123	9999999 –BA- 01

i Any users authorised to modify/delete user access and settings can remove users online via Home > Resources > System and settings > User access and settings.

4. Authorised signatory

i Who can authorise the request?

Adviser (BA) access – Adviser

Office (BO) access – Managing Director or Office principal

Dealer (BD) access – Managing Director

Signature

Name of person authorising

Email address of person authorising

Position of person authorising

i Note: If we do not have the signature of the authorised person on file additional information may be requested.

5. Your signature

Signature

Date

Contact details:

Asgard Capital Management Ltd

ABN 92 009 279 592 AFSL 240695

Online Services 1800 060 802

PO Box 7490, Cloisters Square, WA 6850



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