

Change of Adviser



Complete this form in **BLOCK LETTERS** by typing directly into the form or using **black pen**, print and sign it.

Send the completed form to us via one of the following methods:

- > submit a copy via our secure Document Upload facility on Investor *Online* or AdviserNET (accessed from Forms > Document Upload menu)
- > post to Asgard, PO Box 7490, Cloisters Square WA 6850
- > email a copy to dealersvc@asgard.com.au

If you submit online or email, you don't need to post us the original.

Questions? Call our Customer Relations team on 1800 998 185 Monday to Friday, between 8.30am and 7.00pm, Sydney time (8.00pm during daylight savings time) or email client.support@asgard.com.au

Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at www.asgard.com.au/privacy or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your application.

1. Account details to be transferred

Account number

Account name

2. Adviser details* – to be completed by your financial adviser

Change the financial adviser's details

From: Adviser's name

To: Dealer's name

Adviser's company

Adviser's name

Adviser's phone

Adviser's Service Centre

Adviser's Code

BA

Dealer stamp

* Completion of all fields is mandatory



3. Transferring an eWRAP account to a different promoter – Migration Authority (applies to eWRAP only)

Your new adviser may not be able to access/transact on your existing eWRAP account. In order for us to action your request to change adviser, your existing eWRAP account may need to be transferred to a different promoter which your new adviser has access to. A new eWRAP account will be created in this case. If this is applicable, please complete the following.

I/We instruct Asgard to transfer my/our eWRAP account to the promoter above:

Promoter name

Promoter Code (if known)

 BP

4. Signatures

I/We authorise Asgard to:

- > change my/our financial adviser on my/our account as indicated,
- > provide my/our account information to my/our new adviser, and
- > unless otherwise indicated and subject to law, continue the current adviser fee payment to my/our new adviser.

You make the following acknowledgments if your eWRAP account is to be transferred to a different promoter (see Section 3):

- > you have received the current relevant eWRAP Investment Financial Services Guide (and IDPS Guide) (FSG) or eWRAP Super/Pension Product Disclosure Statement (PDS) (as applicable) for your new eWRAP account
- > your eWRAP fees may change, and some terms and conditions relating to your new eWRAP account may be different to those applying to your existing eWRAP account. The details are set out in the current relevant FSG and PDS (as applicable) for your new eWRAP account
- > you have read and understood the Investor Acknowledgments and Authorities and the CHESS Sponsorship Terms and Conditions in the FSG for the new eWRAP Investment account or the Investor Declarations, Conditions and Acknowledgments in the relevant PDS for the new eWRAP Super/Pension account
- > you expressly acknowledge the matters under the heading 'Important information' on page one of the FSG and PDS, and the fees in the relevant FSG or PDS.

Individual/joint account holders/trustee(s) sign here

If the Account is in joint names, both people must sign. If there are more than two trustees, attach additional signatures.

Signature

Date

Signature

Date

Company or trustee companies sign here

If signing under Common Seal, we confirm it was affixed in our presence.

Signature of: Director Sole Director Sole Secretary

Common Seal

Signature of: Secretary Director

Date

Asgard Capital Management Ltd
ABN 92 009 279 592 AFSL 240695
Correspondence to: Asgard, PO Box 7490, Cloisters Square WA 6850
Customer Relations: 1800 998 185



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