

PortfolioCare

AdviserNET access request

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

- email: useraccess@asgard.com.au
- mail: ATTN: Online Services, PO Box 7229 Perth, Cloisters Square WA, 6000

Questions? Call our Customer Relations team on 1800 060 802 or email onlineservices@asgard.com.au

Note: Please ensure any documents (containing personal information) attached within your email, are sent securely to us.

Options available can be found in the '[Data protection guide](#)'.

I. User details	
Title	Last name
<input type="text"/>	<input type="text"/>
Given names (First name, middle name)	Date of Birth
<input type="text"/>	<input type="text"/>
Other name (if any)	
<input type="text"/>	
AFSL number - mandatory	Gender
<input type="text"/>	<input type="checkbox"/> Male <input type="checkbox"/> Female
Position held	
<input type="text"/>	
Business name	
<input type="text"/>	
Business address - mandatory (PO Box not accepted)	
<input type="text"/>	
Suburb	State Postcode
<input type="text"/>	<input type="text"/>
Postal address (if different to the business address)	
<input type="text"/>	
Suburb	State Postcode
<input type="text"/>	<input type="text"/>
Residential address – for ID reference only (as per your ID documentation)	
<input type="text"/>	
Suburb	State Postcode
<input type="text"/>	<input type="text"/>
Phone (Business) - mandatory	Phone (Mobile) - mandatory
<input type="text"/>	<input type="text"/>
Email address - mandatory	
<input type="text"/>	

User access permissions - (Mandatory - Please select one option)

- View only permissions:
- View and edit permissions:
- View, edit and submit permissions:

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

Authorised by **Managing Director**

In signing below, you are bound by the '[AdviserNET user agreement](#)'. A copy of this agreement can be accessed via onlineservices@asgard.com.au and will be made available when you login to AdviserNET for the first time.

Signature

4. Remove user(s)

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

User name	Given name	Surname	BA Code

Authorised by

Signature

Administered by:
Asgard Capital Management Limited
ABN 92 009 279 592 AFSL 240695
PO Box 7490, Cloisters Square, Perth WA 6850

4. Your signature

In signing the below, you are bound by the 'AdviserNET user agreement'. A copy of this agreement can be accessed via onlineservices@asgard.com.au and will be made available when you log into AdviserNET for the first time.

i Note:

- If we do not have an identification document for the signatory which holds a signature, additional information may be requested.
- If we cannot verify the signature against the identification document we hold on file for the signatory, additional information may be requested.
- If we cannot verify the individual above as an authorised signatory additional information may be requested. .

Signature

Signed date (ddmmyyyy)

Terms and conditions

In signing this form, you are bound by the [‘the AdviserNET user agreement’](#) and [‘Electronic Identity Verification Terms’](#). These terms and conditions will be updated from time to time. Upon your first login you will receive a prompt to accept the most recent terms and conditions. These should be reviewed prior to accepting as they could have been amended since signing this form.

Anti-Money Laundering, Counter-Terrorism Financing and Sanctions obligations

We are bound by applicable laws about the prevention of money laundering and the financing of terrorism as well as sanctions obligations, including but not limited to the Australian Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (AML/CTF laws).

We are required to carry out procedures that verify you and your clients identity before providing services to you, and from time to time thereafter.

Data Protection

For secure data protection, Asgard recommends the use of Fileshare, a secure external file sharing solution that will provide an efficient way for you to send and receive sensitive information. Please contact our Customer Relations team on 1800 060 802 to assist with this setup.

For security reasons, if any documents containing personal information are attached within your email, please ensure that these are password protected. Failure to do so is at your own risk as we’re unable to assume responsibility for your security obligations.

Privacy Collection Notice

Asgard Capital Management Ltd ABN 92 009 279 592 (‘Asgard’) collects personal information from you:

- to process your application
- to communicate and manage our relationship with you
- to ensure you receive product and other important updates, and
- for our related administrative purposes.

We may also use or disclose your personal information where required by, or authorised under privacy law, laws preventing money laundering and terrorism financing, including the Anti-Money Laundering and Counter-Terrorism Financing Act 2006, sanctions obligations and financial services laws. We may also use your information to tell you about products or services we think may interest you. Please note, if you do not provide your personal information we would be unable to process your application and may not be able to provide you access to AdviserNET.

If you do not provide all the information we request, we may need to reject your application, or we may not be able to provide a service to you.

We may disclose your personal information to other members of the Westpac Group (Westpac Banking Corporation and its related bodies corporate), anyone we engage to do something on our behalf such as a service provider, other entities who provide services or products through or in connection with our business and other organisations that assist us with our business.

We may disclose your personal information to an entity which is located outside Australia. Details of the countries where the overseas recipients are likely to be located are in the Privacy Policy.

As a provider of financial services, we have obligations to disclose some personal information to government agencies and regulators in Australia, and in some cases offshore. We are not able to ensure that foreign government agencies or regulators will comply with Australian privacy laws, although they may have their own privacy laws. By using our products or services, you consent to these disclosures.

Privacy Policy

The Privacy Policy is available at asgard.com.au or by calling 1800 998 185. It covers:

- how you can access the personal information we hold about you and ask for it to be corrected;
- how you may complain about a breach of the Privacy Act 1988 and how we will deal with your complaint;
- how we collect, hold, use and disclose your personal information in more detail.

The Privacy Policy will be updated from time to time.