

Please use Block letters and black ink when completing this form.

Complete **YOUR ACCOUNT DETAILS** and indicate under **TYPE OF CHANGE** the required change by ticking the relevant box, then move on to the section indicated and complete all relevant details. Ensure to date and sign these instructions to allow timely processing.

## YOUR ACCOUNT DETAILS

Account number						
Account name						
Investor type	Individual	Joint	Company	Trust	Superannuation Fund	Partnership

### TYPE OF CHANGE

Contacts	<i>Section I</i>	Designation	<i>Section II</i>
Name	<i>Section III</i>	Signature	<i>Section IV</i>
Fee	<i>Section VII</i>	Brokerage	<i>Section VIII</i>

### ADD

Beneficiary	Beneficial owner	Director	Authorised signatory	<i>Section V</i>
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### REMOVE

Beneficiary	Beneficial owner	Director	Authorised signatory	<i>Section VI</i>
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## SECTION I - Change of Contact Details

Contact person					
Residential street					
Suburb		State		Postcode	
Postal street					
Suburb		State		Postcode	
Home phone					
Business phone					
Mobile					
Email one only					
Email (contract notes) multiple acceptable					

## SECTION II - Change / Add of Designation

A designation is an identifier for an account such as <No 1 A/c> or similar

New account designation	
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## SECTION III - Change of Name

Please attach appropriate documentation e.g. Marriage Certificate / Deed Poll / ASIC extract / Deed of amendment.

### Individual

Please complete this section and provide a specimen of your New Signature as well as proof of your name change, such as a certified copy of your Driver's License.

Previous name						
Title	Mr	Mrs	Ms	Miss	Dr	Prof
First / middle name						
Surname						
Type of change	Marriage	Divorce	Deed Poll	Other		
New signature						

### Company & Trust

Please complete this section to update a company or trust name and provide supporting documentation such as an ASIC extract or certified copy of the deed of amendment.

Company name					
ACN		ABN		TFN	
Trust name					
		ABN		TFN	

## SECTION IV - Change of Signatures

Complete this section if you wish to lodge a new specimen of your signature and provide us with proof of your new signature, such as a certified copy of your Driver's License.

Title	Mr	Mrs	Ms	Miss	Dr	Prof
Name						
New signature						

## SECTION V - Add Beneficial Owner / Beneficiary / Director / Authorised Signatory

Title	Mr Mrs Ms Miss Dr Prof					
Name					Date of birth	
Street						
Suburb			State		Postcode	
Country			Tax residency country			
Place of birth			Country of birth			
Nationality			Citizenship			
Signature						
Capacity	Beneficial owner		Beneficiary		Director / secretary Authorised signatory	

### Add Beneficial Owner / Beneficiary / Director / Authorised Signatory

Title	Mr Mrs Ms Miss Dr Prof					
Name					Date of birth	
Street						
Suburb			State		Postcode	
Country			Tax residency country			
Place of birth			Country of birth			
Nationality			Citizenship			
Signature						
Capacity	Beneficial owner		Beneficiary		Director / secretary Authorised signatory	

## SECTION VI - Remove Beneficial Owner / Beneficiary / Director / Authorised Signatory

Title	Mr Mrs Ms Miss Dr Prof					
Name						

### Remove Beneficial Owner / Beneficiary / Director / Authorised Signatory

Title	Mr Mrs Ms Miss Dr Prof					
Name						

## SECTION VII - Change of Fee

Adviser review fee	%	Excl GST or	\$		Excl GST (maximum 2.0% p.a. excl GST)
Ongoing adviser fee	%	Excl GST or	\$		Excl GST (maximum 2.0% p.a. excl GST)

Include Cash Account balance

Adviser signature		Date	
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## SECTION VIII - Change of Brokerage

ASX listed securities	%	Excl GST plus	\$	Excl GST / transaction
International securities	%	plus	\$	Excl GST / transaction min 0.1% plus \$35 (no GST)
Options			\$	Excl GST / transaction

## SECTION IX - DECLARATION

I/we declare that all of the above details are correct.

**Signature**

**Signature**

**Full name**

**Full name**

**Date**

**Date**

### Tick capacity

Individual investor

Joint investor

Trustee 1

Trustee 2

Sole director and company secretary

Sole director and company secretary

Director 1

Director 2

Secretary

Secretary

Joint applicants must both sign;

Company applicants must be signed by two directors, a director and secretary or the sole director and secretary; trusts / superannuation fund applications with individual trustee all trustees must sign

**Privacy** Please note that by sending us information about yourself you are agreeing that the operator can use it for the purposes of operating your Scheme Account. For more information, refer to the Privacy Policy on our website at [www.powerwrap.com.au](http://www.powerwrap.com.au) If you have any questions about your rights under the privacy legislation, please call the operator on 03 8681 4600.