

# CHANGE OF INVESTOR DETAILS



## Part 1 - How to use this form

Use this form to update investor and signatory details on your Powerwrap Investment Account. Provide your **portfolio details** and indicate the **type of change** required by ticking the relevant box. Complete all details in the relevant section of the form.

## Part 2 - Portfolio details

Account name

Account number

## Part 3 - Type of change

### Update to details:

Contact details (part 4)

Designation (part 5)

Name (part 6)

Signature (part 7)

### Remove parties: (part 8)

Beneficiary

Beneficial owner

Director

Authorised signatory

### Add parties: (part 9)

Beneficiary

Beneficial owner

Director

Authorised signatory

## Part 4 - Change of contact details

Name of contact

Residential address

Postal address

Town or suburb

Postcode

Town or suburb

Postcode

State / territory

Country

State / territory

Country

Contact phone

Business phone

Email for correspondence (one per account)

Email for contract notes (trade confirmations)

## Part 5 - Change / add a designation

A designation is an identifier for an account such as "<No 1 a/c>". Please refer to the Powerwrap Investment Account Product Disclosure Statement (PDS) for guidance.

New account designation

## Part 6 - Change of name

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

### A) Individual name

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

New title (e.g. Mr/Ms/Mrs/Dr/Prof)

New name

### Reason for change:

Marriage

Divorce

Deed Poll

Other

New signature

### B) Company or trust name

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.

New Company name

ABN / ACN

TFN

New Trust name

ABN / ACN

TFN

## Part 7 - Change of signature

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

Name

Title (e.g. Mr/Ms/Mrs/Dr/Prof)

New signature

## Part 8 - Remove beneficial owner / beneficiary / director / authorised signatory

Name

Position (e.g Individual, Director, Trustee, etc)\*

Name

Position (e.g Individual, Director, Trustee etc)\*

## Part 9 - Add beneficial owner / beneficiary / director / authorised signatory

Please provide certified copy of identification and, for Directors, a copy of the ASIC company extract.

Name  Date of birth

Address  Place of birth

Country of birth

Town or suburb  Postcode

Nationality

State / territory  Country

Citizenship

Capacity:

**Beneficial Owner**

**Beneficiary**

**Director / secretary**

**Authorised signatory**

Signature

## Part 10 - Declaration

By signing this form, I/we:

- declare that the details I/we have provided are true and correct.
- if signing under a Power of Attorney (POA)\* - verify that at the time of signing, the POA is valid and has not been revoked and the form can be signed by the Attorney.

Signature of account holder 1

Date

Signature of account holder 2

Date

Name

Name

Position (e.g Individual, Director, Attorney etc)\*+

Position (e.g Individual, Director, Attorney etc)\*+

### NOTE

For Joint accounts both parties must sign.

For Companies, must be signed by two directors, a director and secretary or the sole director and secretary;

For Trusts / Superannuation funds with individual trustees, all trustees must sign.

\* If the signatory is Power of Attorney (POA) please enclose an originally certified copy of the Power of Attorney with your application form. The attorney certifies that they have not received notice of revocation of that power.

+ Position/Title options = Individual investor, Director, Secretary, Sole Director, Trustee, Power of Attorney

**Return this completed form and all supporting documents to your Financial Adviser or Nominated Adviser Representative. Alternatively, return to us by post to: Powerwrap Client Services, PO Box 16071, Collins St West VIC 8007**

This form to be used in respect of Powerwrap Investment Account ARSN 137 053 073 issued by Powerwrap Limited ("Responsible Entity", "Powerwrap") ABN 67 129 756 850 AFSL 329829