

# Give your financial adviser access to your Member Direct account

Please complete in pen using CAPITAL letters and print (X) to mark boxes. You must complete all sections and sign the form at Step 5. Read the Privacy Collection Statement on page 3 of this form to see how AustralianSuper uses your personal information.

## 1 Provide your member details

Last name  Mr  Mrs  Ms  Miss  Dr

First name/s

Street address

Suburb State Postcode

Telephone (business hours) Telephone (after hours) Mobile

Email

Date of birth Male Female Your member number

## 2 Provide details of your financial adviser

If you have previously granted a financial adviser access to your account details, providing details of a new adviser here will remove access for the previous adviser.

Full name of financial adviser<sup>1</sup>

Name of licensee

Adviser email address<sup>1</sup>

Telephone ASIC Financial adviser representative number<sup>1</sup> Licensee AFSL number<sup>1</sup>

<sup>1</sup> Mandatory fields

## 3 Changes to your nominated adviser

If the financial adviser you have nominated in Step 2 moves to a different business (i.e. a different financial licensee), but remains an authorised adviser and registered with AustralianSuper, please let us know who you would like to have on-going access to your Member Direct account. The authority provided below will remain effective until a new nomination form is completed.

Please mark (X) in one box only:

- I authorise the **same financial adviser** I have nominated in Step 2 to continue to have access to my Member Direct account. If the adviser moves to a different licensee I understand this authorisation will only be effective if the financial adviser continues to be registered with AustralianSuper.
- I authorise **another financial adviser** (being a financial adviser who is authorised by the same licensee specified in Step 2 and registered with AustralianSuper) to have access to my Member Direct account. I understand that in selecting this option, the authority given to the financial adviser nominated in Step 2 will lapse.

Please note:

- the level of access the financial adviser has will be in accordance with your selection in Step 4; and
- you may withdraw the authority you have given in this Step 3, or provide authority to a new financial adviser, by calling us on **1300 300 273** or emailing or messaging us at [australiansuper.com/contact-us](mailto:australiansuper.com/contact-us)
- More information about withdrawing your authority or providing a new authority appears in Step 5.



## 4 Level of access

As a member invested in the Member Direct investment option, you can give your financial adviser (Adviser) online access to allow monitoring and/or managing of your account with AustralianSuper.

### What is the level of access you want to provide your Adviser?

Mark (X) in one box only

- Read only access
- Read and transact access

By granting your Adviser 'read only' access, you authorise your Adviser and/or their staff to:

- obtain information about your member account and investments, and
- act as your agent to receive information, online alerts or reports allowed by law, contract or otherwise to be provided to you. The receipt of the information and reports by your Adviser is deemed to be receipt of the information and reports by you.

By granting your Adviser 'read and transact access', in addition to the 'read only' access outlined above, you authorise your Adviser and/or their staff to:

- carry out instructions regarding the operation of your Member Direct account and access your account details; and
- agree and acknowledge that you have given **prior approval** to your Adviser regarding the specific transactions they execute on your behalf in relation to your Member Direct account, and where required, you have received a Statement of Advice or Record of Advice from your Adviser referencing those transactions in relation to your Member Direct account.

The instructions or transactions for which this authority applies include:

- switch between investment strategies/underlying investment holdings including purchases and selling investments
- change your payment strategy (for retirement income accounts)
- issue a request to move money into or out of your transaction account
- make elections on dividend or distribution re-investment where applicable, or
- close your Member Direct account.

AustralianSuper and/or its service providers can accept and act on such instructions given by your Adviser without requiring your signature, additional proof, instructions or further confirmation from you. You will release, discharge and indemnify AustralianSuper from and against any liabilities, costs or losses that AustralianSuper may incur in connection with the appointment of your Adviser and/or the acts or omissions of your Adviser and/or your Adviser's staff, except to the extent that any such liability, cost or loss is caused by any fraud, negligence or wilful misconduct by AustralianSuper (or its agents, employees, officers or contractors). This does not exclude, restrict or modify, or have the effect of excluding, restricting or modifying AustralianSuper's liability for breach of a statutory warranty or condition implied by law, including Australian consumer protection laws.



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