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.

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								
DDMMYYYY										

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.

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¹ Mandatory fields

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
- 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 (\boldsymbol{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.

5 Member declaration

Member

To the best of my knowledge, the information I have provided on this form is correct and will be used to action my request. I have read the Privacy Collection Statement below and I understand how AustralianSuper will use my personal information. By signing this form I agree to give my Adviser access to my Member Direct account and understand that:

- my nominated Adviser will be granted access to my Member Direct investment options on either a 'read only' or 'read and transact' basis, according to my instructions in Step 4 of this form
- if I'm invested in other investment options in addition to Member Direct, my Adviser will be granted 'read only' access to these additional investment options, regardless of my selection in Step 4. Only I will be able to make changes or give instructions relating to my non Member Direct investment options
- I may withdraw my Adviser's authority or provide authority to a new financial adviser by calling AustralianSuper on 1300 300 273 or by visiting australiansuper.com/contact-us to message AustralianSuper. The withdrawal or change will take effect by the fifth business day after the day on which AustralianSuper receives my phone call or written notice. AustralianSuper may rely and act on any instructions received by my current Adviser and deduct fees from my account up until the withdrawal or change takes effect. AustralianSuper will have no obligation to reimburse me any Adviser fees that are deducted from my account up until the withdrawal or change takes effect.
- if I'm a registered user of the Member Direct online platform, I will continue to be bound by the Terms and Conditions of the Member Direct online platform.

I have read, understood, accepted and agree to be bound by the terms and conditions for using AustralianSuper Member Direct online platform available at **australiansuper.com/MemberDirectTCs**

Sign here (Member)

			Date) D	Μ	Μ	Y	Y	Y	Y
Print name										

Adviser

] I have read, understood, accepted and agree to be bound by the terms and conditions for using AustralianSuper Member Direct online platform available at **australiansuper.com/MemberDirectTCs**

Sign here (Adviser)

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Prir	nt na	ame																										

Privacy Collection Statement

Please read this Privacy Collection Statement to see how AustralianSuper uses your personal information.

AustralianSuper Pty Ltd (ABN 94 006 457 987) of GPO Box 1901, Melbourne, Victoria, 3001, collects your personal information (PI) to operate, and administer, your super account (including insurance) or retirement income account, improve our products and services and keep you informed. If we can't collect your PI we may not be able to perform these services. PI is collected from you but sometimes from third parties like your employer and your financial adviser (if applicable). We will only share your PI where necessary to perform our activities with our administrator (Australian Administration Services Pty Ltd,) being a part of MUFG Pension & Market Services Holdings Ltd), our contact centre provider (Concentrix Services Pty Ltd), service providers, as required by law or court/tribunal order, or with your permission. Your PI may be accessed overseas by some of our service providers and, where applicable to your circumstances, by third-party service providers of your financial adviser. Our Privacy Policy details how to access and change your PI, as well as our privacy complaints process. For complete details go to **australiansuper.com/privacy** or call us on **1300 300 273**.

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