

Adviser services form

Please use **BLOCK LETTERS** and **black ink**.

Complete this form to notify us of a change to your financial adviser or to start or amend an adviser service fee arrangement.

Send your completed form to:

Australian Ethical Investment Ltd, Reply Paid 3993, Sydney, NSW, 2001.

Step 1: Investor details

Investor number

Name investor 1

Name investor 2

Name investor 3

Full name of company/partnership/trustee/other entity

Step 2: Adviser information

Please have your financial adviser stamp and sign this form. By stamping this document the financial adviser is confirming that they hold a current AFS Licence and are authorised to deal in and/or advise on managed investment products.

Adviser details

Adviser name

Address

Phone

Fax

Dealer stamp

Dealer group

Email

Adviser signature

Date

D	D	M	M	Y	Y	Y	Y
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Advisers stamping and signing this form do so on the understanding that Australian Ethical Investment Ltd has no agency relationship with any broker or adviser and that no broker or adviser acts under Australian Ethical Investment Ltd's authority.

Step 3: Adviser service fee

Complete this section to update your advisor service fee arrangements.

Adviser service fee

Fill in the adviser service fee to be paid to the adviser:

Adviser service fee (annual % of total investment)	
Maximum 1% pa*	%

* 0% unless stated otherwise.

All fees are quoted exclusive of GST

Step 4: Declaration and signature

Our Privacy Policy (available on our website) outlines more information on how we collect, secure, use and disclose your personal information.

By completing this Adviser Services Form, I/we declare that:

- If I/we have authorised a financial adviser to receive payment by way of adviser service fees, I/we understand these fees will be deducted from my/our investment and that this form supersedes any previous authorisation and will stay in force until varied or revoked.
- I/we understand that I/we can cancel an adviser authority at any time.
- I/we am aware that Australian Ethical Investment Ltd will hold a record of my/our personal information, and consent to my/our personal information being used and/or disclosed to the licensee or adviser I/we have indicated on the Adviser Service Form, until I/we notify Australian Ethical Investment Ltd otherwise.

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Signatory's full name (please print)

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Signatory's full name (please print)

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Signatory's full name (please print)

For joint investments all investors must sign.

Contact us

t 1800 021 227
e investors@australianethical.com.au
w australianethical.com.au
p Reply Paid 3993, Sydney NSW 2001