



Australian Ethical Superannuation Pty Ltd (ABN 43 079 259 733, RSE L0001441) (Australian Ethical) which is the trustee of the Australian Ethical Retail Superannuation Fund (ABN 49 633 667 743, USI AET0100AU) (Fund)

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

Step 1: Confirm your member details (This section is used to verify your identity, not to update your details)

Member number

Surname

Full given name(s)

Date of birth

Phone

Email

Address

Suburb

State

Postcode

Country

Information Authority

Complete this form to allow a third party to request information in relation to your Australian Ethical Super accounts on your behalf. The authorisation is not effective until we receive this completed form, and will remain effective until you revoke or change your authority.

Once Australian Ethical receives the completed form, we will provide your nominee(s) indicated in step 3, with information (oral, written or electronic) in relation to your Australian Ethical Super account as if the request was made by you. At anytime if you do not wish your nominee(s) to be able to access information in relation to your Australian Ethical Super accounts, you should notify us immediately.

The nominated person(s) will not be authorised to change your personal contact details, give any instructions or carry out any transactions on your behalf, including switching investment options, making contributions, requesting a rollover or making lump sum withdrawals. Personal information such as your tax file number and bank account details will not be released to the nominated person under any circumstances.

Step 2: Dealer group details

Dealer Group Name

AFSL

Step 3: Adviser details

Adviser (Primary contact)

Email

Direct line

Mobile

Authorised rep #

Name (Secondary contact)

Email

Direct line

Mobile

Type of nominee:

Paraplanner

Assistant

Other _____

Adviser Services Fee Deduction Authority

Step 4: Adviser service fee

Complete this section to update your adviser service fee arrangements.

The adviser service fees indicated below will be deducted from your Australian Ethical Super account at the end of the month.

If there are insufficient funds in your account at deduction date, the adviser service fee will be deducted at the end of the month when sufficient funds are first available to pay the full amount of the fee.

All fees are quoted exclusive of GST

Single asset based fee	
Maximum per payment - \$2,000	\$

Ongoing asset based fee	
Maximum 1% p.a.	% p.a.
Maximum \$1000 per month	\$ per month

Step 5: Authorisation and declaration

By signing this form I am making the following declaration:

- I declare that the information I have provided on this form is true and correct.
- I understand that Australian Ethical may provide my personal information and information relating to my Australian Ethical Super account to the nominees on this form when requested by the nominees.
- I understand that this authority will not allow the nominees to change my personal details or carry out any transactions on my behalf.
- I understand that this nomination will remain in effect until I provide notice to change or revoke the authority.
- I agree to give Australian Ethical notice if I wish to change or revoke this authority. I agree that Australian Ethical is not responsible for any loss or delay which results from Australian Ethical providing information to my nominees.
- I agree to release, discharge and indemnify Australian Ethical from and against all actions, claims, demands, expenses and liabilities (however they arise) suffered by myself or suffered by or brought against Australian Ethical, in respect of the information given by Australian Ethical to my nominee(s).
- I agree and understand that I have directly engaged the Dealer Group and/or the Adviser to provide Financial Services. I agree that Australian Ethical is not a party to that arrangement and is not liable for any loss which results from that arrangement.
- If I have authorised a Financial Adviser to receive payment by way of adviser service fees. I understand these fees will be deducted from my investment and will continue until I provide notice for the Adviser Service Fee to cease.
- I have read and accept the following privacy collection notice Personal information is collected by and held for Australian Ethical by its administrator in accordance with the Privacy Act 1988 (Cth), for the purpose of administering accounts, providing services associated with those accounts and may be used for marketing and research purposes. Without this information we would not be able to provide our services to you. You can opt out of receiving marketing material at any time by calling us or notifying us via email. Your personal information may be disclosed to third party service providers (some of which may be located overseas) or otherwise as permitted by law. For further information about how personal information is handled, our complete privacy policy can be viewed at australianethical.com.au/privacy-policy/ (a hard copy of the policy can be provided on request). You can also contact us at privacy@australianethical.com.au for any queries.

Member signature

X

Member's full name (please print)

Date

D	D	M	M	Y	Y	Y	Y
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Send your completed form to:

Australian Ethical Super, Locked Bag 20013, Melbourne VIC 3001.

Contact us

t 1300 134 337
e members@australianethical.com.au
w australianethical.com.au