

## SERVICE REQUEST FORM

### Changes to an account

Please use this form if you would like to update any of the following details for an account:

1. Add or remove a bank account (all investors including trustees or directors must sign)
2. Change the investor status (wholesale, retail or professional investor)
3. Change adviser fees or other account fees
4. Nominate a new adviser for the account

#### Checklist:

- Signed and dated by the authorised signatories for the account (specified by the 'Authorised Signatory' form)
- Certified copies of supporting documentation provided (if applicable). Please keep all original documents for your own records
- Advisers to submit this form online as a service request (Adviser home > Work in progress > Service requests)

Account name

Account number

#### ONLY COMPLETE THE SECTIONS YOU WOULD LIKE TO CHANGE

##### 1. Bank account change

Note: Signatures are required from ALL parties (individuals, trustees or directors) for any changes to bank account details. This supersedes the Authorised Signatory form where 'Any to sign' has been selected.

- Remove existing bank account

Bank account name

BSB

Account number

- Add new bank account

Bank account name

BSB

Account number

Please ensure that the nominated bank account is in the name of the investor/s as according to the type of account, for example:

*Name of the individual or joint investors*

*Name of the trustee/s of the super fund or trustee/s <ATF super fund name>*

*Name of the trustee/s of the trust or trustee/s <ATF trust name>*

*Name of the trustee/s of the trust or trustee/s <ATF trust name>*

*Name of the corporation*

*Mason Stevens does not facilitate withdrawals to a bank account in the name of a third party, known as a third party payment*

#### 4. Investor status change

Existing status (select one)

Retail

Wholesale

Professional investor

New status (select one)

Wholesale

Date signed

Sophisticated investor certificate must be enclosed

Retail

Date client signed

Statement of advice must be enclosed

Professional investor

Date signed

Professional investor certificate must be enclosed

#### 5. Adviser fees or other account fee changes

Note: a reduction in fees does not require a signature by the authorised signatories

	Existing fee % / \$	New fee % / \$	State specific portfolio or state 'all'
<input type="checkbox"/> Ongoing adviser fee	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Adviser ad-hoc fee	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Other fee _____	<input type="text"/>	<input type="text"/>	<input type="text"/>

#### 6. Nominate a new adviser

Existing adviser's full name

Existing adviser's dealer group

New adviser's full name

New adviser's dealer group

#### Transfer existing adviser fees (select one)

Please transfer all current ongoing adviser fees to the financial adviser nominated above. I consent to authorise and request Mason Stevens to deduct the adviser fees from my account and to pay those amounts to the nominated adviser above.

Please do not transfer the current ongoing adviser fees to the financial adviser nominated above. All ongoing adviser fees on my account will revert to zero until further notice.

If you wish to change the ongoing adviser fee, you must also complete a section 5 above 'Adviser fees or other account fee changes'

**Signed by authorised signatories**

**Individual 1 / Trustee 1 / Director 1**

Full name

Signature

Date

Capacity  Individual  Director  
 POA / Representative  Trustee

**Individual 2 / Trustee 2 / Director 2**

Full name

Signature

Date

Capacity  Individual  Director  
 POA / Representative  Trustee

**Individual 3 / Trustee 3 / Director 3**

Full name

Signature

Date

Capacity  Individual  Director  
 POA / Representative  Trustee

**Individual 4 / Trustee 4 / Director 4**

Full name

Signature

Date

Capacity  Individual  Director  
 POA / Representative  Trustee

**Individual 5 / Trustee 5 / Director 5**

Full name

Signature

Date

Capacity  Individual  Director  
 POA / Representative  Trustee

**Individual 6 / Trustee 6 / Director 6**

Full name

Signature

Date

Capacity  Individual  Director  
 POA / Representative  Trustee

**Note for advisers:**

Please log in online and submit this form via the Service Request screen.  
(Adviser home > Work in progress > Service requests)