

Update personal details

For individuals, joint and trust (minors) accounts

We respect your privacy and handle your information in accordance with our privacy policy, available on mlc.com.au
You can update these details online. To do this login to mlc.com.au

1. Your account details

Account number 1

Account number 2

Account number 3

Account number 4

Contact telephone (business hours)

Email

Please select account type (more than one box can be ticked)

Individual accounts

Title

Mr Mrs Miss Ms Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)*

* If you are updating your date of birth you will need to enclose an original certified copy of your identification. For more information on acceptable ID and a list of certifiers refer to the Proof of Identity Guide on mlc.com.au

Joint or trust (minors) accounts

Account name

For companies, partnerships, associations, trusts, registered co-operatives and superannuation funds, please use the 'Update entity details' form.

2. Your changes

Please select and complete the sections where you want to make a change, then sign **Section 8** to authorise these changes.

- | | | |
|--|--------------------------|--------------------|
| Change your name | <input type="checkbox"/> | Complete Section 3 |
| Change your address | <input type="checkbox"/> | Complete Section 4 |
| Change your contact details | <input type="checkbox"/> | Complete Section 5 |
| Change your occupation | <input type="checkbox"/> | Complete Section 6 |
| Change authorised access to your account | <input type="checkbox"/> | Complete Section 7 |

3. Change your name

| | |
|---|----------------------|
| Title | First name |
| Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Other <input type="text"/> | <input type="text"/> |
| Middle name | Family name |
| <input type="text"/> | <input type="text"/> |

Please provide an **original certified** copy of your marriage certificate, change of name certificate or divorce decree. We can only accept a marriage certificate issued by the appropriate State or Territory Registry of Births, Deaths and Marriages. Certification that the document is a true and complete copy of the original must appear on each page with an original signature and the title of the person who endorses the document. We can't accept change of name documents via fax or email.

Please sign using your previous and new signatures below.

Previous signature

| | |
|----------------------|----------------------|
| <input type="text"/> | Date (DD/MM/YY) |
| <input type="text"/> | <input type="text"/> |

New signature

| | |
|----------------------|----------------------|
| <input type="text"/> | Date (DD/MM/YY) |
| <input type="text"/> | <input type="text"/> |

If you have no other changes, please go to **Section 8** to authorise your request.

4. Change your address

If you are updating a postal address to a PO Box, please also give us your residential address.

Residential address (your residential address can't be a PO Box)

| | | | |
|----------------------|----------------------|----------------------|----------------------|
| Unit number | Street number | Street name | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Suburb | Postcode | State | Country |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Postal address (if different to residential address)

The postal address shown can't be your financial adviser's address.

| | | | |
|----------------------|----------------------|----------------------|----------------------|
| Unit number | Street number | PO Box | Street name |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Suburb | Postcode | State | Country |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

For Investment account clients, if you're changing your country of residence, please let us know if this will change your status for tax purposes. To update Your Tax file Number (TFN), please go to the Update account details form on mlc.com.au

5. Change your contact details

Mobile phone number

Contact telephone (business hours)

Home telephone

Email

6. Change your occupation

You'll need to choose one employment/occupation description from the list available on mlc.com.au/codelookup

Occupation

7. Authorise access to your account information

Add a new authority Update an existing authority Remove an existing authority

If you would like to nominate someone else to make enquiries on your accounts listed on page 1, please complete the details below.

Title

Mr Mrs Miss Ms Other

Address (we can't accept a PO Box)

Surname

Given name(s)


Date of birth (DD/MM/YYYY)

Contact telephone (business hours)

Contact telephone (business hours)

Email

Signature of authorised representative

| | |
|---|----------------------|
|  | Date (DD/MM/YY) |
| | <input type="text"/> |

I release, discharge and indemnify MLC from all losses, liabilities, actions, proceedings, claims and demands including in relation to negligence) in respect of acts or omission of my/our authorised representative, whether authorised by me or not.

Please go to **Section 8** to authorise your request.

8. Your authorisation

Please sign below to authorise us to process your request.

If signed under the Power of Attorney: Attorneys must attach a certified copy of the Power of Attorney if not already supplied.

The Attorney hereby certifies that he/she has not received notice of any limitation or revocation of his/her Power of Attorney and is also authorised to sign this form.

Power of Attorney documents can't be accepted by fax or email.

Name of Investor or Attorney

Signature

| | | | | | | |
|---|-----------------|--|--|--|--|--|
| X | Date (DD/MM/YY) | | | | | |
| | | | | | | |

Name of Investor or Attorney

Signature

| | | | | | | |
|---|-----------------|--|--|--|--|--|
| X | Date (DD/MM/YY) | | | | | |
| | | | | | | |

9. Send us your form

Please mail your completed, signed and dated form to:

MLC
GPO Box 2567
Melbourne VIC 3001

If you have any questions, please speak with your financial adviser, call us on **132 652** on Monday to Friday between 8.00 am and 6.00 pm (AEST/AEDT), or visit mlc.com.au