Change of financial adviser

MLC Wrap
MLC Navigator

We respect your privacy and handle your information in accordance with our privacy policy, available on **mlc.com.au**

All existing Adviser Service Fee arrangements will be reduced to nil when changing your financial adviser unless you choose to keep them the same in section 3. If you want to change your adviser payment instructions, you'll need to complete an **Adviser Remuneration** form. You can find this form on **mlc.com.au**

1. Your account details

Please list below the accounts to be transferred to your new financial adviser.

Account number 1

Account number 2

Account number 3

Account number 4

If you have more accounts, please attach a separate list.

Please go to **Section 2**

2. Your personal details

Name of account

Please select your account type and provide the details requested (you can tick more than one box):

☐ **Individual accounts**

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

☐ **Joint accounts, company, partnership, unincorporated body (if applicable), trust or superannuation funds**

Account name

Contact details

Email

Contact telephone (business hours)

Please go to **Section 3**

NULIS Nominees (Australia) Limited
ABN 80 008 515 633
AFSL 236465

Navigator Australia Limited
ABN 45 006 302 987
AFSL 236466

MLC Superannuation Fund
ABN 40 022 701 955

3. Your new financial adviser

Important information

There are now statutory restrictions on the types of remuneration that can be paid through retail accounts once the financial adviser has been changed. To ensure that we comply with these rules, we will reduce any contribution and asset based commission payable to nil.

Name of Financial Adviser

Name of firm (licensēe)

Adviser number

Contact telephone (business hours)

Fax number

Email

Do you want your existing adviser fees to carry across to your new adviser?

☐ Yes

☐ No – All existing Adviser Service Fee arrangements will be reduced to nil. If you want to change your adviser payment instructions, you'll need to complete an Adviser Remuneration form. You can find this form on **mlc.com.au**

If no selection is made All existing Adviser Service Fee arrangements will be reduced to nil.

Please go to **Section 4** to authorise this transfer.

4. Your agreement and declaration

I agree that for the account numbers listed in **Section 1**:

- I'm not receiving advice from my existing financial adviser
- I authorise MLC to change my financial adviser as detailed in **Section 3**
- my existing financial adviser will no longer be remunerated for advising me and will no longer have access to my information
- my new financial adviser will be responsible for advising me, may be remunerated at a rate I agree to for this advice and will have access to my information
- I'll advise MLC if I change or cancel my financial adviser or if there are any changes to my existing adviser remuneration arrangements.

If signed under 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 via fax or email.

Signature of Investor one or Attorney

Name

✗

Date (DD/MM/YY)

Signature of Investor two (if applicable) or Attorney

Name

✗

Date (DD/MM/YY)

5. Send us your form

Please mail, email or fax your completed, signed and dated form to:

MLC
GPO Box 2567
Melbourne VIC 3001

Email: services@mlc.com.au

Fax number: (03) 9869 1595

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

A127056-0616