



# MLC MasterKey Update personal details

For individuals, joint and trust (minors) accounts

You can update these details online. To do this login to [mlc.com.au](http://mlc.com.au)

Please don't photocopy this form as it contains unique information to help us process your request quickly.

## 1. Your current details

Account number 1

Account number 2

Account number 3

Customer number 1 (if known)

Customer number 2 (if known)

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](http://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.

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## 2. Your changes

Please select and complete the sections where you want to make a change, then sign **Section 7** to authorise these changes.

- Change your name  Complete Section 3
- Change your address  Complete Section 4
- Change your contact details  Complete Section 5
- Change your occupation  Complete Section 6

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## 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 7** to authorise your request.

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## 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 MLC MasterKey Investment Service Fundamentals, MLC MasterKey Investment Service and MLC MasterKey Unit Trust clients, if you are 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) information, please go to Update account details form on [mlc.com.au](http://mlc.com.au)

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## 5. Change your contact details

Mobile phone number

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Contact telephone (business hours)

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Home telephone

--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Email

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## 6. Change your occupation

You'll need to choose one employment/occupation description from the list available on [mlc.com.au/codelookup](http://mlc.com.au/codelookup)

Occupation

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## 7. Your agreement and declaration

Before making this change I have reviewed the information on the management of my account in the relevant **How to Guide, Product Disclosure Statement or Annual Report**. (These documents are available on [mlc.com.au](http://mlc.com.au))

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.

**Name of Investor or Attorney**

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**Signature**

X	Date (DD/MM/YY)										
	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										

**Name of Investor or Attorney**

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**Signature**

X	Date (DD/MM/YY)										
	<table border="1"><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>										

For MLC MasterKey Investment Service Fundamentals and MLC Investment Service, please go to **Section 8**.

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## 8. Confirmation

**MLC MasterKey Investment Service Fundamentals and MLC MasterKey Investment Service accounts only.**

Would you like to be sent paper confirmation of this update? Up to date information is available from [mlc.com.au](http://mlc.com.au):

Yes

No

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## 9. Send us your form

Please mail your completed, signed and dated form to:

**MLC**  
**PO Box 200**  
**North Sydney NSW 2059**

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](http://mlc.com.au)