

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

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

* Mandatory field

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

☐ 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 7** to authorise these changes.

- | | | |
|--------------------------------|--------------------------|--------------------------|
| Change your name | <input type="checkbox"/> | Complete Section 3 and 4 |
| Change or confirm 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 |

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"/>

- ☐ I give my consent for the Trustee to verify my identity by disclosing my name, residential address and date of birth to a credit reporting agency and by confirming the authenticity of my Government issued identification with relevant Government departments or approved service provider.

Please email TWO copies of identification to **contactmlc@mlc.com.au**. A full list of identification documents is available in the Proof of identity guide on **mlc.com.au**

- ☐ 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"/>

Please complete Section 4 and 7 to complete and authorise your name change request.

4. Change or confirm your address

If you are changing your name in **Section 3** you're required to confirm 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"/>	

^ If you are updating your country of residence we may request 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**

Postal address (if different to residential address)

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

5. Change your contact details

Mobile phone number

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Contact telephone (business hours)

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Home telephone

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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

Occupation

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7. Important information and signature

By signing and submitting this form, you acknowledge before making this change you have considered the information on the management of your account in the relevant **Product Disclosure Statement, Financial Service Guide, How to Guide and/or Annual Report**. (These documents are available on mlc.com.au)

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.

If signed by a duly Authorised Representative or Parent/Guardian: The Authorised Representative or Parent/Guardian hereby certifies that he/she has not received notice of any limitation or revocation of his/her authority and is also authorised to sign this form.

Privacy

you acknowledge that any personal information you provide will be handled in accordance with the Trustee's privacy policy, which outlines how the Trustee will manage your personal information, how you may access or correct your personal information, and how you may complain about a breach of your privacy. You may obtain a copy of the Trustee's privacy policy by contacting **132 652** or visiting mlc.com.au/privacy

Please sign below to authorise us to process your request.

Name of Investor or Attorney

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Name of Investor or Attorney

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Signature of Investor or Attorney

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

Signature of Investor or Attorney

	Date (DD/MM/YY)					
	<table border="1"><tr><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**.

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:

☐ Yes

☐ No

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