Shadforth Portfolio Service

25 February 2019

Family Fee Aggregation Application

Complete the following form to apply for Family Fee Aggregation across **Shadforth Portfolio Service products[1].**

Terms and conditions

- Each person applying to link for the purposes of Family Fee Aggregation must be a member of the same immediate family (such as spouse, son, daughter, partner, father, mother, brother, sister, grandparents and the spouses of immediate family members) including multiple accounts for the same person.
- Any new Family Fee Aggregation nomination will override any previous nomination.
- A maximum of six accounts are allowed to be linked together for Family Fee Aggregation purposes.
- Accounts nominated for Family Fee Aggregation within the same group must be associated with the same financial adviser.
- A Family Fee Aggregation request can be rejected and a linking can be cancelled at any time by us.
- Each linked account may be able to view information about the other Family Fee Aggregation accounts, including names and account numbers.

The Service Operator collects the information in this form for the purpose of updating the information it holds about me. Any personal information provided in this form will be handled in accordance with the Service Operator's privacy policy, available at www.sfg.com.au/portfolio/privacy.

Please ensure that each linked account holder (including yourself) completes and signs this form, and that each account holder has read and understood the terms and conditions of this form and the information in the relevant PDS or Offer Document.

Please complete these instructions in BLACK INK using CAPITAL LETTERS and ✓ boxes where provided.

Linked account

Title (Dr/Mr/Mrs/Ms/Miss)

Surname

Given name(s)

Account number (if known)

Date of birth / /

Relationship to group (such as spouse)

Declaration: I have read the current PDS and/or Offer Document, and the terms and conditions of Family Fee Aggregation. I apply for my account(s) to be linked to other parties detailed on this form for the purpose of calculating the Administration Fee, and warrant that the information I have disclosed in this form is true and correct.

Signature

Date / /

[1] Shadforth Portfolio Service products include: Shadforth Portfolio Service - Super, Shadforth Portfolio Service - Pension and Shadforth Portfolio Service - Investment.

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Signature

Date / /

Please forward all correspondence and enquiries to:

Post: Shadforth Portfolio Service
Reply Paid 264, Melbourne VIC 8060

Email: portfolioservice@sfg.com.au

Telephone: 1800 931 792