Shadforth Portfolio Service

25 February 2019

Change of Details

- **Shadforth Portfolio Service – Super**
- **Shadforth Portfolio Service – Pension**
- **Shadforth Portfolio Service – Investment**

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

Step 1: Client details

Account type ☐ Super ☐ Pension ☐ Investment Account number*

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

Given name(s)*

Date of birth* / /

Email

* Indicates a mandatory field. If you do not complete all of the mandatory fields, there may be a delay in processing your request.

Step 2: Change of name

Only complete this section if your name has changed.

We require supporting documentation to action your request.

New name

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

Given name(s)

Please enclose one of the following proof of change of name documents (please tick appropriate box(es)):

☐ A **certified copy** of your marriage certificate

☐ A **certified copy** of your change of name certificate

☐ A **certified copy** of your marriage certificate and Decree Nisi (Divorce Papers)

AND one of the following primary identification documents issued in your new name:

☐ A **certified copy** of your driver's licence issued under State or Territory law

☐ A **certified copy** of your passport

For name changes, a certified copy of the original documents will need to be provided. Please refer to the 'Completing Proof of Identity' document on portfolio.sfg.com.au for a list of persons authorised to certify copies of original documents.

Step 3: Change of residential address and other details

For a fast and convenient way to change your residential address simply log into Shadforth Portfolio Online and enter your user ID and password. If you have not registered for Shadforth Portfolio Online, please click on the 'Register for access' link and follow the instructions to gain access.

Alternatively, please contact Shadforth ClientFirst on 1800 931 792. Please note that you will need to satisfy an identification check of the mandatory fields in Step 1, to change your details.

If you are unable to change your residential address using the above methods please complete the details below.

Address

Suburb State Postcode

Phone (home) Phone (work)

Mobile

Email

Step 4: Change of postal address

Is your postal address the same as your residential address provided in Step 3? ☐ Yes ☐ No

Please provide postal address if different from the residential address in Step 3.

Address

Suburb State Postcode

Phone (home) Phone (work)

Step 5: Change to financial institution details for ad hoc withdrawals

Financial institution

Branch

Account name

BSB – Account number

Please note that the account must be held either solely or jointly in your name.

Step 6: Change to pension payment (Shadforth Portfolio Service – Pension only)

Please change my pension payment to:

Frequency ☐ Monthly ☐ Quarterly ☐ Half-yearly ☐ Yearly

Pension amount

☐ Minimum

OR

☐ Maximum limit*

OR

Other amount $ per annum Indexation rate %

* Transition to retirement pension only.

Please note: We require five business days to action your request. If we have not received your request in time to alter your next scheduled payment, please be assured your alteration will take effect from the following payment.

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If you are receiving pension payments and your bank details have changed, please complete the details below:

Name of financial institution

Branch address

Suburb State Postcode

Account name

BSB – Account number

Step 7: Change of adviser

Licensee name

Adviser surname

Adviser given name(s)

Phone Facsimile

AFS license number

Step 8: Client declaration

Please note: The Trustee / Service Operator collects the information in this form for the purpose of updating the information it holds about you. The information provided in this form will be handled in accordance with the privacy policy at www.sfg.com.au/portfolio/privacy. If you do not provide all of the requested information, we may not be able to action your request.

- I consent to the collection and use of the above information by the Trustee / Service Operator for the purposes specified.
- I authorise the above changes to be made to my account details.
- I authorise provision of information regarding my account to the above adviser (where a new adviser has been nominated).
- I declare that the details given in this form are true and correct.

Signature of client / Power of Attorney or Guardian Date / /

Previous signature (where name has changed) Date / /

Please note: If this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this form unless we have already received it).

If you wish to renew or change your advice fees, binding death nomination of beneficiaries, investment strategy, direct debit details, or insurance, please complete the relevant form available from your licensed financial adviser, from our website or by contacting Shadforth ClientFirst (where applicable).

Please forward all correspondence and enquiries to

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GPO Box 264, Melbourne VIC 8060

Email: portfolioservice@sfg.com.au

Telephone: 1800 931 792

Web: portfolio.sfg.com.au