Update member/investor personal details



Use this form to provide or update personal details or account information on your account.

Complete this form in **BLOCK LETTERS** by typing directly into the form or using **black pen**, print and sign it.

Send the completed form to us via one of the following methods:

- > ask your adviser to lodge it on your behalf on AdviserNET
- submit a copy via our secure Document Upload facility on Investor Online or AdviserNET (accessed from Forms > Document Upload Menu)
- > post it to Asgard, PO Box 7490, Cloisters Square, WA 6850
- > email a copy to <u>asgardforms@asgard.com.au</u>.

If you submit online or email, you don't need to post us the original.

This symbol indicates you need to give us more information.

Questions? Call our Customer Relations team on 1800 998 185 Monday to Friday, between 8.30am and 7.00pm, Sydney time (8.00pm during daylight savings time) or email client.support@asgard.com.au

Important information

- > If you are making changes to your date of birth (i.e. we do not have it or it is incorrectly recorded), you will need to provide a certified copy of your birth certificate, passport or driver's license along with this request.
- > If you are sending this request via email, it must come from the email address we have on our records.

Privacy Statement and Consent Request

Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at <u>www.asgard.com.au/privacy</u> or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your request.

Consent Request

If we require you to provide identification documents (which only applies if you are providing/correcting your date of birth), by signing below, you consent to us collecting and holding any sensitive information such as health information or information about your racial or ethnic origin which appears on copies of your identity documents. You will not be able to withdraw your consent to Westpac holding this information after it has been provided because Westpac is required to retain copies of identification documents under the *Anti-Money Laundering and Counter Terrorism Financing Act 2006 (Cth)*.

1. Account details – mandatory

Account number		
Account name		

2. Personal details of Individuals who are members, investors or trustees

Member/Investor 1/Trustee 1

Title		
Given names		
Residential addres	SS	



2. Personal details of Individuals who are members, investors or trustees (continued)

Mobile																		
Email																		
Date of b	birth																	

• For date of birth corrections, please attach a certified copy of your identification eg driver's licence issued under state or territory law, passport issued by the Commonwealth that has not expired within the past two years. For the full list of acceptable documents, please refer to the following link: https://www.bt.com.au/content/dam/public/panorama/pdf/BT_Panorama_-_How_to_certify_documents_flyer.PDF

Investor 2 (for joint tenants only)/Trustee 2

Title	Surname
Given names	
Residential addres	SS SS
Mobile	
Email	
Date of birth	

• For date of birth corrections, please attach a certified copy of your identification eg driver's licence issued under state or territory law, passport issued by the Commonwealth that has not expired within the past two years. For the full list of acceptable documents, please refer to the following link: https://www.bt.com.au/content/dam/public/panorama/pdf/BT_Panorama_-_How_to_certify_documents_flyer.PDF

¹ Tick here if there are more than 2 individuals, and provide details on a separate sheet

3. Tax File Number - for Super/Pension accounts only

You are not obliged to provide us with your Tax File Number (TFN). However, providing us with your TFN gives you advantages which may not apply if you choose to withhold your TFN, as detailed in Section 11 of our Privacy Statement. Please contact the Australian Taxation Office for more information about your TFN and its use.

Any details you do provide us (including your TFN) that are personal information will be collected, used and disclosed in accordance with our Privacy Statement (in particular please see Section 11 as regards TFNs) which is available at www.asgard.com.au/privacy or by calling us.

Tax file number (TFN)



4. Australian Company Number (ACN) – for Company, SMSF/Trust with a Corporate Trustee only

Australian Company





5. Australian Business Number (ABN)	– for SMSF only
ABN	
6. Signatures	
By signing this form I/we confirm that the details provided on this agree to the consents in the Privacy State 	
If the account referred to in Section 1 is holders, attach additional signatures.	in joint names, all account holders must sign. If there are more than four account
Signature of:	Signature of:

	Signature of:
Member/Investor 1 Trustee 1 Director	Investor 2 Trustee 2 Director
Sole Director Sole Secretary Power of Attorney	Secretary Power of Attorney
Signature of:	Signature of:
Signature of:	Signature of:

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 (BTFM) as the Trustee for Asgard Independence Plan Division 2 ABN 90 194 410 365. Asgard Capital Management Ltd ABN 92 009 279 592 AFSL 240695 (Asgard) as Administrator and Custodian. Asgard as the Operator for Asgard eWRAP Investment (and badged versions) and Asgard Infinity eWRAP Investment. BTFM and Asgard are part of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714 (Westpac). Customer Palotions: 1900 008 195 Customer Relations: 1800 998 185 PO Box 7490, Cloisters Square WA 6850



