

# CHANGE OF INVESTOR DETAILS



Use this form to update investor and signatory details on your Powerwrap Investment account.

## Part 1 - Summary of requirements

Complete your **account details** and indicate under **type of change** the required change by ticking the relevant box, then move on to the section indicated and complete all relevant details.

## Part 2 - Account details

Account name

Account number

## Part 3 - Type of change

### Update to details:

Contact details (part 4)

Designation (part 5)

Name (part 6)

Signature (part 7)

### Remove (go to part 8):

Beneficiary

Beneficial owner

Director

Authorised signatory

### Add (go to part 9):

Beneficiary

Beneficial owner

Director

Authorised signatory

## Part 4 - Change of contact details

Name of contact

Residential Address

Postal address

Town or suburb

Town or suburb

State

Postcode

State

Postcode

Email for communications (one only)

Email for contract notes

Home phone

Business phone

## Part 5 - Change / add a designation

A designation is an identifier for an account such as <No 1a/c> or similar

New account designation

## Part 6 - Change of name

Please attach appropriate documentation e.g. Marriage Certificate / Deed Poll / ASIC extract / Deed of amendment

### Individual

Please complete this section and provide a specimen of your new signature as well as proof of your name change, such as a certified copy of your driver's license.

Previous name

New name

New Title

### Reason for change:

Marriage

Divorce

Deed Poll

Other

New signature

### Company or trust

Please complete this section to update a company or trust name and provide supporting documentation such as an ASIC extract or certified copy of the deed of amendment.

Company name

ACN

ABN

TFN

Trust name

ABN

TFN

## Part 7 - Change of signature

Complete this section if you wish to lodge a new specimen of your signature and provide us with proof of your new signature, such as a certified copy of your driver's license

Name

Title

New signature

## Part 8 - Remove beneficial owner / beneficiary / director / authorised signatory

Name

Title

Name

Title

## Part 9 - Add beneficial owner / beneficiary / director / authorised signatory

Name		Date of birth	
Address		Place of birth	
		Country of birth	
Town or suburb			
State	Postcode	Nationality	
		Citizenship	
<b>Capacity:</b>			
Beneficial Owner	Beneficiary	Director / secretary	Authorised signatory

Signature

\*Please provide certified copy of identification and, for Directors, a copy of the ASIC company extract.

## Part 10 - Declaration

By signing this form, I/we:

- declare that the details I/we have provided are true and correct.
- if signing under a Power of Attorney (POA)\* - verify that at the time of signing, the POA is valid and has not been revoked and the form can be signed by the Attorney.

Signature 1

Date

Title (Individual investor, Director, Secretary, Sole Director, Trustee, Power of Attorney)\*

Signature 2

Date

Title (Individual investor, Director, Secretary, Sole Director, Trustee, Power of Attorney)\*

For Joint accounts both parties must sign.

For Companies, must be signed by two directors, a director and secretary or the sole director and secretary;

For Trusts / Superannuation funds with individual trustees, all trustees must sign.

\* If the signatory is Power of Attorney (POA) please enclose an originally certified copy of the Power of Attorney with your application form. The attorney certifies that he/she has not received notice of revocation of that power.