

# Self-Managed Invest – appointment or change of Financial Adviser

Office use only

## 1 Account details

Account name (i.e. name of fund)

SMI Investor number

### Account authority details

Title

☐ Mr ☐ Mrs ☐ Ms ☐ Dr  Other

Full name

Email address

Contact telephone (if mobile drop the 0)

+ 6 1

Address

Suburb

State

P/C

## 2 Financial adviser's details

Please tick the relevant box

- ☐ Remove existing financial adviser, (proceed to step 3) OR
- ☐ Add financial adviser, OR
- ☐ Update financial adviser (by selecting this box, you will remove any existing financial adviser on file)

Name of new financial adviser

Name of firm (licencee)

### Authority level

- ☐ Account authority (can transact on behalf of the trustee), OR
- ☐ Information only access

AFSL Number ( 6 numbers)

ABN

Contact telephone (if mobile drop the 0)

+ 6 1

Email address

Principle place of business

Suburb

State

P/C

By submitting this form I confirm that:

- The Investor details/numbers listed in Section 1 are complete and correct;
- I am the Account Authority for this Trustee;
- I authorise Hostplus to replace the adviser details with the details provided in section 2

### Signature 1

Given names

I,

Surname

Solemnly declare that the information I have provided is true and correct to the best of my knowledge.

Signature of applicant\*

Date\*

### Signature 2

Given names

I,

Surname

Solemnly declare that the information I have provided is true and correct to the best of my knowledge.

Signature of applicant\*

Date\*



If signed under 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.



Please send the completed form to Hostplus SMI GPO Box 764, Melbourne VIC 3001.

If you have any questions, call us on **1300 350 819** Monday to Friday between 8am – 8pm (AEST) or visit [hostplus.com.au/smi](https://hostplus.com.au/smi)