

CHANGE OF ADVISOR

Please complete this form if you wish to notify Refined Registry of a change to your advisor details.

Please type or print using a pen and print letters inside the boxes.



A Investor Details

Company or Trust in
which Investment is held

Full Name(s) of
Registered Holding

Address

Suburb

State

Postcode

Investment Profile ID or Account Number

B Current Advisor

Please mark the box that is applicable to you.

☐

Change financial advisor for your holding

☐

Remove your current advisor from your holding

C Advisor Details

Current Advisor Details

Name of Current Advisor

Company Name

Registered Address

Suburb

State

Postcode

New Advisor Details

Name of New Advisor

Company Name

AFSL Number

Advisor Number

Registered Address

Suburb

State

Postcode

Email Address

D Sign Here - This section MUST be completed

I/We declare that:

All details provided in this form are true and correct and I/we undertake to inform you of any changes to the information supplied as and when they occur.

**Signature of Individual Securityholder / Director /
Sole Director and Sole Company Secretary**
(Please delete as applicable)

**Signature of Joint Securityholder / Director /
Company Secretary**
(Please delete as applicable)



Name

Name

Date
(dd/mm/yyyy)

Date
(dd/mm/yyyy)

Important Information

Individual:

This form is to be signed by the security holder.

Joint Holding:

Where the holding is in more than one name, all of the security holders must sign.

Power of Attorney:

To sign under Power of Attorney, you must have already lodged this document with the registry. If you have not previously lodged this document for notation, please attach an original certified copy of the Power of Attorney to this form when you return it. When signed under Power of Attorney, the attorney states that they have not received a notice of revocation. Refined Registry needs to sight a certified copy of the Power of Attorney.

Companies:

This form must be signed by either 2 Directors or a Director and a Company Secretary. Alternatively, where the company has a Sole Director and, pursuant to the Corporations Act, there is no Company Secretary, or where the Sole Director is also the Sole Company Secretary, that Director may sign alone and is required to complete the warranty stating that there is no Company Secretary by completing their name in full.

Privacy Clause: Refined Registry Services Pty Ltd (ABN 42 679 874 330) advises that Chapter 2C of the Corporations Act 2001 requires information about you as a security holder (including your name, address and details of the securities you hold) to be included in the public register of the entity in which you hold securities. Information is collected to administer your security holding and if some or all of the information is not collected then it might not be possible to administer your security holding. Your personal information may be disclosed to the entity in which you hold securities. You can obtain access to your personal information by contacting us at the address or telephone number shown on this form. Our privacy policy is available on our website www.refinedregistry.com.au.

Sending your form

All correspondence to:

Email: registry@refinedregistry.com.au

Postal Address:

Refined Registry Services
PO Box R775
Royal Exchange NSW 1225

Phone: +61 2 8912 9830
www.refinedregistry.com.au