Change of financial adviser

We respect your privacy and handle your information in accordance with our Privacy Policy, available at **investinfo.com.au/premiumchoice**

All existing Adviser Service Fee deductions from your account will be cancelled once we process your request to change your financial adviser. If you have negotiated an advice fee with your financial adviser and want to have advice fees deducted from your account, you'll need to complete an **Adviser Service Fee** form. You can find this form at **investinfo.com.au/premiumchoice**

1. Your account details

Please list below the accounts to be transferred to your new financial adviser.

Account number 1

Account number 2

Account number 3

Account number 4

If you have more accounts, please attach a separate list.

Please go to **Section 2**

2. Your personal details

Name of account

Please select your account type and provide the details requested (you can tick more than one box):

☐ **Individual accounts**

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

First name

Middle name

Family name

Date of birth (DD/MM/YYYY)

☐ **Joint accounts, company, partnership, unincorporated body (if applicable), trust or superannuation funds**

Account name

Contact details

Email

Contact telephone (business hours)

Please go to **Section 3**

NULIS Nominees (Australia) Limited
ABN 80 008 515 633
AFSL 236465

Navigator Australia Limited
ABN 45 006 302 987
AFSL 236466

PremiumChoice Retirement Service
ABN 70 479 285 132

3. Your new financial adviser

Important information

There are now statutory restrictions on the types of remuneration that can be paid through retail accounts once the financial adviser has been changed. To ensure that we comply with these rules, we will reduce any contribution and asset based commission payable to nil.

Name of Financial Adviser

Name of firm (licensee)

Adviser number

Contact telephone (business hours)

Fax number

Email

Once this form is processed, we will stop deducting any existing Adviser Service Fees from the accounts listed in section 1.

Please confirm if you have negotiated an advice fee with your financial adviser below and want us to deduct these fees from your account?

☐ Yes – You'll need to complete an **Adviser Service Fee** form. You can find this form at **investinfo.com.au/premiumchoice**

☐ No

Please go to **Section 4** to authorise this transfer.

4. Your agreement and declaration

I agree that for the account numbers listed in **Section 1**:

- I'm not receiving advice from my existing financial adviser
- I authorise Navigator Australia Limited or NULIS Nominees (Australia) Limited (each, as applicable, the "Provider") to change my financial adviser as detailed in **Section 3**
- Once my financial adviser has been changed, my existing financial adviser will no longer be remunerated for advising me and will no longer have access to my information
- My new financial adviser will be responsible for advising me and will have access to my information
- I acknowledge that the Provider will not deduct any Adviser Service Fees from my account unless and until the Provider has received and processed a properly completed Adviser Service Fee form.

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.

Power of Attorney documents can't be accepted via fax or email.

Signature of Investor one or Attorney

Name

✗ Date (DD/MM/YY)

Signature of Investor two (if applicable) or Attorney

Name

✗ Date (DD/MM/YY)

5. Send us your form

Please mail, email or fax your completed, signed and dated form to:

PremiumChoice Client Services
GPO Box 1610
MELBOURNE VIC 3001

Email: premiumchoice@investinfo.com.au
Fax number: (03) 9869 1595

If you have any questions, please speak with your financial adviser, call us on **1300 880 054** Monday to Friday between 8.00 am and 6.00 pm (AEST/AEDT) or visit **investinfo.com.au/premiumchoice**

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