



IOOF Portfolio Service Superannuation Fund Financial Adviser Authority

Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** and **✓** boxes where provided.

!
**DO NOT use
this form to APPOINT or
CHANGE your existing
Financial Adviser.**

Step 1: Your personal details

Account number - **D** -

Title (Dr/Mr/Mrs/Ms/Miss) Surname

Given name(s)

Address

Suburb State Postcode

Date of birth / /

Step 2: Financial Adviser details

Dealer name

Financial Adviser name

Contact name

AFS Licence number

Financial Adviser number

Step 3: Financial Adviser Authority

I authorise my financial adviser, whose details are set out above, to provide IOOF with switch instructions and establish/change my Investment Instructions on my behalf. I acknowledge that my financial adviser should provide me with all necessary information regarding the investment options and should not switch my managed funds and/or provide Investment Instructions under this authority without my prior written approval.

I accept the terms outlined below:

- I release and indemnify the Trustee and any member of the IOOF Group from and against all demands, action, proceedings, losses, liabilities and costs arising directly or indirectly out of or in connection with the Trustee acting or omitting to act on instructions given by my financial adviser under this authority;
- I authorise the Trustee to continue to follow instructions given under this authority until the Trustee receives notice in writing signed by me to cancel the authority.

Signature

Date / /

Post to: IOOF Portfolio Service, Reply Paid 264, Melbourne VIC 8060
Enquiries: 1800 062 963
Facsimile: 1800 558 539
Trustee: IOOF Investment Management Limited (IOOF), ABN 53 006 695 021, AFS Licence No. 230524