

1 October 2012

Change of personal details

Please complete these instructions in **BLACK INK** using **CAPITAL LETTERS** (except for your email address) and **✓** boxes where provided.

Step 1: Your current personal details (as recorded by us)

Account number (if known) - -

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

Given name(s)

Date of birth / /

Step 2: Change of name details (if applicable)

Only complete this section if your name has changed.

We require supporting documentation to action your request.

New name

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

Given name(s)

Please enclose one of the following proof of change of name documents (please tick appropriate box(es)):

- A **certified copy** of your marriage certificate
- A **certified copy** of your change of name certificate
- A **certified copy** of your marriage certificate and Decree Nisi (Divorce Papers)

AND one of the following primary identification documents issued in your new name:

- A **certified copy** of your driver's licence issued under State or Territory law
- A **certified copy** of your passport

For name changes, a certified copy of the original documents will need to be provided. A person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (eg Justice of the Peace, Police Officer, etc) and date.

Step 3: Change of contact details (if applicable)

Only complete this section if these details have changed.

New residential address

Address

Suburb State Postcode

New postal address (if different from residential address)

Address

Suburb State Postcode

New phone number(s)

Phone (bh) Phone (ah)

Phone (mobile)

Step 4: Change of preferred email address (if applicable)

Preferred email address

If you have previously registered to receive your communications about your investment electronically, by providing your new preferred email address you agree we will now send these communications to this updated email address.

Step 4: Member/Applicant declaration and signature

- I declare that the information provided on this form is true and correct.
- I have read, understood and consent to the collection, use, storage and disclosure of my personal information as described in the relevant Product Disclosure Statement and in the IOOF group Privacy Policy.

Note for Power of Attorney

If this form is signed under a Power of Attorney, please enclose a certified copy of the Power of Attorney with this form. If signed under Power of Attorney, the attorney certifies that he/she has not received notice of revocation of that power.

Member/Applicant signature

Signature

Date / /

Please sign and return this form to:

Post: IOOF Portfolio Service, Reply Paid 264, Melbourne, VIC 8060

Email: clientservices@ioof.com.au

Facsimile: 1800 558 539

Enquires: 1800 062 963 (Personal Superannuation)

1800 653 894 (Employer and Corporate Superannuation)

Trustee: IOOF Investment Management Limited, ABN 53 006 695 021, AFS Licence No. 230524

Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (such as Justice of the Peace, Australia Post employee, etc) and date.

The following can certify copies of the originals as true and correct copies:

- Chiropractor
- Dentist
- A legal practitioner, who is on the roll of the Supreme Court of a State or Territory or the High Court of Australia
- Medical practitioner
- Nurse
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Psychologist
- Trade marks attorney

Other persons:

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Australian Consular Officer or Australia Diplomatic Officer (within the meaning of the Consular Fee Act 1955)
- Bailiff
- Bank officer with 2 or more continuous years of service
- Building society officer with 2 or more years of continuous service
- Chief executive officer of a Commonwealth court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with 2 or more years of continuous service
- Employee of the Australian Trade Commission who is:
 - a in a country or place outside Australia; and
 - b authorised under paragraph 3(c) of the Consular Fees Act 1955; and
 - c exercising his or her function in that place
- Employee of the Commonwealth who is:
 - a in a country or place outside Australia; and
 - b authorised under paragraph 3(c) of the Consular Fees Act 1955; and
 - c exercising his or her function in that place
- Fellow of the National Tax Accountants' Association
- Finance company officer with 2 or more years of continuous service
- Holder of a statutory office not specified in another item in this list
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961

- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
 - a an officer; or
 - b a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 2 or more years of continuous service; or
 - c a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the National Institute of Accountants
- Member of:
 - a the Parliament of the Commonwealth; or
 - b the Parliament of a State; or
 - c a Territory legislature; or
 - d a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licences
- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
 - a the Commonwealth or a Commonwealth authority; or
 - b a State or Territory or a State or Territory authority; or
 - c a local government authority; with 2 or more years of continuous service who is not specified in another item in this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - a the Commonwealth or a Commonwealth authority; or
 - b a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy