

Change or Removal of Adviser

Please refer to the end of this document for submission instructions.

Section 1 – Service Selection and Account Details

Which service/s are you nominating a new adviser for or removing an existing adviser from?

☐ All applicable services relating to username – UserID

This is your UserID for the Geared Investments website. If unknown, call us on **13 15 20** to obtain.

☐ Geared Investments Loan

Account name

Loan number

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Section 2 – New Adviser Details

Adviser number, adviser code or username

Dealer Group name

Adviser name

Email address

Work number

Mobile number

Date of appointment (DD/MM/YYYY)



Note:

By nominating an Adviser you are providing them with full authority to act on your behalf in regards to your Geared Investments Loan.

Section 3 – Declaration and Acknowledgements

All account holders must sign this declaration.

- I/We declare that all details provided in this form are true and correct. I/We undertake to inform you of any changes to the information supplied, as and when they occur.
- I/We consent to my/our details being changed as indicated in this form.
- I/We authorise you to provide access to my/our account/s to my new adviser.
- I/We acknowledge that the new adviser will have all authority on my/our account/s as described in the relevant disclosure document.
- I/We authorise you to notify the fund managers of any managed investments I/we have lodged as security, of this adviser appointment.

Account Holder/Director/Secretary/Trustee 1

Full name

Signature (must be signed pen to paper) Date signed (DD/MM/YYYY)

Account Holder/Director/Secretary/Trustee 2 (if applicable)

Full name

Signature (must be signed pen to paper) Date signed (DD/MM/YYYY)



Note:

If there are more than 2 authorised signatories, please photocopy this page and attach to the form.

Commonwealth Bank Geared Investments Loan is issued by Commonwealth Bank of Australia ABN 48 123 123 124 AFSL 234945. This product is administered by Commonwealth Securities Limited ABN 60 067 254 399 AFSL 238814 (CommSec), a wholly owned but non-guaranteed subsidiary of the Commonwealth Bank of Australia. CommSec is a Market Participant of ASX Limited and Cboe Australia Pty Limited, a Clearing Participant of ASX Clear Pty Limited and a Settlement Participant of ASX Settlement Pty Limited.

How to submit your documents

Clients

Please provide your completed and signed form with relevant supporting documents via the below details.

If you are required to send Original Certified Copies of documents please send via post to:

 **Geared Investments, Locked Bag 34, Australia Square NSW 1215**

 **13 15 20**  **gearedinvestments@cba.com.au**  **commbank.com.au/gearedinvestments**