

Change of Financial Adviser Form

Macquarie Specialist Investments



To change your financial adviser, please complete this form.

Please use black ink and BLOCK letters.

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Your details

Investor/Facility name:

Investor ID/Facility number(s):

(If known, please provide all numbers if you hold more than one investment/facility):

Product name(s):

2

New financial adviser details

Title: Name:

Surname:

Authorised representative number Company name:

Dealer Group name:

Mailing address Street name and number:

Suburb: State: Postcode:

Contact numbers

Work number: Fax number:

Mobile number: Email address:

Does your new financial adviser have a Macquarie Access Code (MAC)?

My Adviser does not have an existing MAC and password

My Adviser does have an existing MAC and password, which is

Please sign below to:

- consent for your details to be changed;
- instruct the Macquarie Group entities which have issued you with an investment/loan facility to pay any trailing commission to your new financial adviser; and
- provide access to your account online to your new financial adviser (unless you have previously indicated otherwise).

Authorised signature(s)

Investor 1/Borrower 1/Director/ Sole Director and Sole Company Secretary (delete whichever is not appropriate):

Date: /

Please print name:

Surname:

Investor 2/Borrower 2/Director/ Sole Director and Sole Company Secretary (delete whichever is not appropriate):

Date: /

Please print name:

Surname:

Important Information

By completing this form, you will be supplying the issuer(s) of the financial product(s) named above or the loan provider (**Macquarie**) with personal information in respect of which Macquarie will be bound by the *Privacy Act 1988*. Failure to update us with your financial adviser's details may result in Macquarie being unable to comply with your instructions or provide you with an appropriate level of service in relation to the financial product(s) named above or your loan facility. As you are providing us with personal information about someone else, you must first ensure that you have obtained their consent to provide their personal information to us based on this privacy statement. Any personal information collected by the Macquarie Group will be handled in accordance with our Privacy Policy. You agree and acknowledge that Macquarie may collect this information and disclose it to relevant regulatory authorities (eg tax authorities in Australia and overseas) in connection with their lawful information requests or to meet our obligations under the *Financial Transaction Reports Act 1988*, the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* or other Australian or overseas legislation. We may exchange your personal information with other companies in the Macquarie Group as well as our service providers, which may operate outside of Australia, in the locations specified in our Privacy Policy. A copy of that policy (which contains further details about our handling of personal information, including how you may access or update your personal information and how we deal with your concerns) can be obtained by visiting our website macquarie.com.au or by requesting a copy from us.

Please complete and return to **Macquarie Specialist Investments, GPO Box 4294, Sydney NSW 1164**, email structuredinvestments@macquarie.com or facsimile **02 8232 6158**.

If you require any assistance please contact the **Client Service Team** on **1800 080 033** or email structuredinvestments@macquarie.com.

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Bank Use Only	CIP Collection Complete	Signature	Name	Date