

Adviser nomination form



* Indicates that providing this information is mandatory. Not doing so may delay the processing of your request.

This adviser nomination applies to all your Aware accounts held in an Aware Super Product or other Aware Product, including closed accounts and new accounts that are opened at a future date.

This form will only allow the nomination of a Financial Adviser. If you wish to nominate a third party authority please use the *Third Party Letter of Authority* (V851) form.

What can your nominated Financial Adviser do under this Form?

- Register to automatically receive your Aware Super account information directly into their financial planning software, subject to any limits we apply.
- Request information about your account and/or any documents provided by us in relation to it, subject to any limits we apply.
- View all of your account details via Aware Super's Adviser Portal.
- Extend this authority to Authorised Officers in their office (such as assistants and support staff).
- Initiate transactions on your behalf via Aware Super's Adviser Portal, including a request to withdraw, transfer your benefit, or change your details, including bank account updates, for your approval via Member Online.

What can't your nominated Financial Adviser do under this form?

- Facilitate any transactions on your behalf, including a withdrawal or transfer of your benefit, unless you have consented to the transactions initiated by your Adviser via Member Online.
- Request a payment (in any form) to be made to someone other than you.
- Change your personal contact details.
- Appoint and authorise another nominated Financial Adviser or any other person to provide any services covered by this form, unless it's their Authorised Officers.

Please use a dark pen and CAPITAL letters. As a registered adviser, if you have any questions, please contact our Adviser Solutions Team at adviserservicing@aware.com.au or on **1300 046 615**.



The information provided at Step 1 will enable Aware Super to ensure your account is correctly identified.



Note: If this adviser nomination is for a new member to Aware Super, please insert 'New member' in the mandatory 'Member number' section and ensure that you send the new application with this nomination form.

Step 1: Your personal details

I instruct Aware Super Pty Ltd, ABN 11 118 202 672, AFSL 293340, as Trustee of Aware Super, ABN 53 226 460 365 and Aware Financial Services Australia Limited, ABN 86 003 742 756, AFSL 238430 to provide access to all my Aware accounts held by me in an Aware Super or Other Aware Product including closed accounts and new accounts that are opened in the future, to the Financial Adviser named at Step 2.

Member number*

Title

Date of birth* (DD-MM-YYYY)

First name*

Middle name

Last name*

Home address* (must not be a PO Box)

Suburb*

State*

Postcode*

Mobile number*

Daytime contact number

Email*

By providing my email address I'm consenting to receive communications from Aware Super digitally as appropriate and in accordance with Aware Super's Privacy Policy. I understand I can change my communication preferences at any time by logging into Member Online or calling Aware Super on **1300 650 873**.



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Step 2: Nominate your Financial Adviser

Only financial advisors registered with Aware super can be nominated as your financial adviser.

Registered Licensee name*

Licensee AFSL number*

Financial Adviser details

First name*

Last name*

Aware Super Adviser ID*

Email*

Step 3: Read our privacy information

The personal information provided on this form is collected and held by Aware Super, in accordance with the Australian Privacy Principles of the *Privacy Act 1988* (Cth), for the purpose of administering accounts, assessing claims and providing services associated with fund membership. For further information about how personal information is handled, please call us on **1300 650 873** or visit **aware.com.au/privacy** to view the privacy policy (a hard copy of the policy may also be provided on request). The policy contains information about access to and correction of personal information, how a complaint can be made about a privacy breach and other important information about how personal information is collected, used and disclosed.

Step 4: Declaration

- I declare the information supplied by me is true and correct.
- I have read, understood, and accept the Aware Super privacy policy.
- I authorise the nominated Financial Adviser and/or their Authorised Officers to initiate transactions on my behalf via Aware Super Adviser Portal for my approval via Aware Super Member Online.
- I acknowledge that I have up to 30 days from when the relevant transaction form(s) are on Member Online to approve or reject any of the transactions.
- I understand that I have complete discretion to approve or reject any of the transactions initiated by my Financial Adviser and/or their Authorised Officers, via Aware Super Member Online.
- I authorise Aware to provide the nominated Financial Adviser and/or their Authorised Officers with any requested information and/or documents about my Aware Super Account/s by electronic means, including the exchange of information directly from Aware systems to a third party software/systems used by the Financial Adviser and/or their Authorised Officers, to provide financial advice.
- I authorise the Financial Adviser nominated and/or their Authorised Officers to obtain information and/or documents about my Aware Super Account/s digitally via the Adviser Portal, through secure data feeds, over the phone or through any other secure methods that may be available in the future, and I authorise Aware Super to provide this information and the requested documents.
- I acknowledge the exercise of any powers under this arrangement by a person reasonably believed by Aware Super or its service providers to be my nominated Financial Adviser or to be acting on behalf of my nominated Financial Adviser, will be treated as if I had personally exercised these powers.
- I acknowledge that this arrangement will continue until I cancel the authority in writing or unless it otherwise terminates in accordance with any contract between Aware Super and the Licensee of my nominated Financial Adviser. In the event that I cease to be a client of my nominated Financial Adviser, I acknowledge that Aware Super also reserves the right to terminate this arrangement.
- I acknowledge that Aware Super has complete discretion to refuse or accept an authority.

Step 4: Declaration (continued)

- I release Aware Super in its capacity as Aware Super Pty Ltd as Trustee, and Aware Financial Services Australia Limited as Responsible Entity for of various investment funds, other members of Aware Super and Aware Super's service providers from any claim I may have as a result of any act or omission of my Financial Adviser under the authority I have given in this form. This release is subject to Aware Super having taken reasonable steps to ensure that my Financial Adviser has acted within the scope of the authority I have given. Further, this release does not limit any claim or indemnity to which Aware Super may be entitled under any law or contract.
- I agree that if I have a nominated Financial Adviser, I can't claim that my nominated Financial Adviser, or an Authorised Officer appointed by my nominated Financial Adviser, was not acting on my behalf.
- By completing this form, any previous adviser nomination will be removed from my account/s and that nominated Financial Adviser will no longer have access to my information. The Financial Adviser nominated in this form will replace my previous nominated adviser.



Please sign and date form here.

Member Signature

Date signed (DD-MM-YYYY)

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Upload or post the form to us.

Step 5: How to send us your completed form

Upload clear copies of your completed form and supporting documents via our website at **aware.com.au/upload**. Acceptable file formats are **pdf, jpeg, jpg** and **png**.

OR

Please post the completed form to:

Aware Super
GPO Box 89
MELBOURNE VIC 3001

In case you need any further assistance, please contact our Member Support Team on **1300 650 873**.

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