

# Change of details form

Adelaide Managed Funds

Fax completed form to: Manager Unit Registry (02) 8256 1407

Investor name:

Investor ID:

Do you have an Investment Loan for this product? Yes  No

If yes, please provide your Investment Loan number and we will forward your change of details to Leveraged Equities.

Investment Loan number:

## A Change of nominated account details

Name of financial institution:

BSB number:

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Account number:

Account name:

NB: if nominating a Credit Union or Building Society, the accounts must be held in exactly the same name.

## B Change of Holder Identification Number (HIN)

Old HIN:

New HIN:

## C Change of address

Old residential:

New residential:

Postal address:

Postal address:

Phone number:

Phone number:

## D Change of name

Provide certified copy of marriage certificate or registration of change of name

Old name(s):

New name(s):

Old signature:

New signature:

## E Change of entity name

Please tick applicable box (✓)

Company (provide change of certificate of incorporation) ACN/ABN:

Business (provide change of business certificate) ARBN:

Partnership (provide partnership agreement)

Super Fund Trust (provide copy of amendment of trust deeds)

New name:

Affix seal here  
if required

## F Customer authorisation

I/We the undersigned declare that the information shown on this change of details form is true and correct.

### Privacy disclosure statement

We, Adelaide Managed Funds, collect your personal information to assess your application and to provide you with the product or service you have requested. We may also use your personal information to carry out marketing activities, research and product development. We treat your personal information as confidential and only disclose it to others where necessary. For example, we usually disclose your information to each other, to organisations to whom we outsource functions such as mailing and printing houses, to its providers, account holders and operators, your financial adviser or broker (including their authorised service providers) and other financial institutions or persons nominated by you. Your information may also be disclosed to related companies within the Bendigo and Adelaide Bank Group, where its confidentiality is maintained at all times. We do not sell, rent or trade your personal information. In most cases you can gain access to your personal information. Please contact us if you wish to do so, or if you have any queries about your personal information.

### Investor 1

Signature:

Date:

### Investor 2

Signature:

Date:

[ OFFICE USE ONLY ]

Investment number:

Scan number:

Signature of checking officer: