



Authority to advise

Use this form to appoint a personal financial adviser, provide servicing and transactional authority to them and to authorise the payment of adviser service fees. Please arrange for your adviser to complete *Your adviser details* and *Adviser service fees*.

Your details

If you have any questions, please call us on **1300 880 588** or email enquiries@smartMonday.com.au

For more information go to our website smartMonday.com.au

Member number

Title

Given names

Surname

Date of birth (DD/MM/YYYY)

Sex (M or F)

Telephone

Mobile

Email

Postal address

Suburb

State

Postcode

Your adviser details

Your adviser should complete this section.

Adviser code

Adviser name

Adviser dealer group

Phone

Email

Send your completed form to: smartMonday, Reply Paid 1949, Wollongong DC, NSW 2500 (no stamp required).

smartMonday is the business name of the Aon Master Trust ABN 68 964 712 340 (the Fund) which has been registered by Aon Hewitt Limited ABN 48 002 288 646 AFSL 236667 as sponsor of the Fund. The trustee of the Fund is Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE Licence L0001458. smartMonday PRIME, smartMonday DIRECT and smartMonday PENSION products are part of the Fund.

Adviser service fees (inclusive of GST)

Please select one option only.

Ongoing fee (0%—2% pa of my total account balance)* %

Ongoing fixed-dollar fee (\$0—\$10,000 pa)* \$

and/or

Ad hoc fixed-dollar fee (up to \$10,000 pa)* \$

* The sum of ongoing and ad hoc fees is capped at the greater of \$10,000 pa or 2% pa of the total assets under advice across your super and pension products.

Adviser's signature

Date (DD/MM/YYYY)

Your declaration and authorisation

Servicing authority

- I wish to appoint the adviser nominated in *Your adviser details* as my authorised and servicing adviser and request:
 - ▢ that all relevant information on my superannuation, investment accounts and insurance policy/s, or other financial information be released to my adviser
 - ▢ that the servicing rights and responsibilities for any policies held on my behalf with your institution are passed on to my adviser and for this to be noted on the policy/s immediately.
- I authorise my adviser to access via the internet my benefit quote information, contribution history and other online details (with the exception of tax file number data) and to make member enquiries on my behalf.
- I authorise the fee shown in *Adviser service fees* to be deducted from my account balance and paid to my adviser in accordance with the relevant Product Disclosure Statement.
- I understand that I can cancel this authority at any time by giving written notice to the trustee at smartMonday, Reply Paid 1949, Wollongong DC, NSW 2500 (no stamp required).

Transactional authority

By signing this form, I also authorise my adviser (when requested by me) to change or switch my investment options, update my contact details and address, issue a request to move money into or out of my account, or close my account.

Member's signature

Date (DD/MM/YYYY)

Transactional authority for the direct investment option (DIO)

Should I invest in DIO, I also authorise my adviser to:

- manage and monitor my DIO account
- make transactions in relation to my account including switching between investment strategies and purchasing or selling investments.

By signing this form, I confirm that I have read and understood the [DIO Terms and Conditions of use](#).

Member's signature

Date (DD/MM/YYYY)