



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 contact us using the details provided on your personalised member homepage.

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 a registered trading name of Aon Solutions Australia Limited ABN 48 002 288 646 AFSL 236667 (Aon), the sponsor of the Aon Master Trust ABN 68 964 712 340 (the Fund). The trustee of the Fund is Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE Licence L0001458. This document has been prepared by Aon on behalf of the Trustee. 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.

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)