

Adviser Change of details form

Send the completed and signed form, and supporting documentation as required, to

- **Mail**
 Credit Suisse Investments (Australia) Limited
 P.O. Box R758
 Royal Exchange NSW 1225
 Australia
 - **Fax**
 Attention: Investor Relations
 +612 8205 4730
 - For further information, please contact
 Investor Relations **1300 366 860**
 +612 8205 4489 (if calling from outside Australia)
- 8:30am to 5:30pm Monday to Friday (Sydney time)

Select from the following

- Update contact details.** Complete **Step 1** and **Step 4.**
- Transfer client(s) within the same dealer group.** Complete **Step 1, Step 2** and **Step 4.**
- Update to a new dealer group.** Complete **Step 1, Step 3** and **Step 4.**

Step 1: Adviser details

Adviser number (if known)

Adviser name

Current dealer group name

Telephone

Email address

Former dealer group name (if relevant)

Contact details

PO Box no.

Street address

Suburb

State

Postcode

Country (if not Australia)

Telephone number

Fax number

Email address

Step 2: Transfer clients within the same dealer group

Note: This is to be completed by the adviser to whom the clients are transferring.

- Please find attached a signed letter of release from
- each of my client(s)
 - or
 - the former financial adviser
 - or
 - an authorised signatory (or authorised signatories) of my dealer group authorising the transfer of the listed client(s).

Please note that clients will remain with the former adviser held on file unless we receive a signed letter of release.

Important – you must also tick ✓ relevant box below

- Please maintain any existing entry fee rebate arrangements for each of my client(s) as listed in the signed letter of release attached.
- Please remove any existing entry fee rebate arrangements for each of my client(s) as listed in the signed letter of release attached.

If you do not nominate an entry fee arrangement, any existing entry fee rebate arrangements will be removed.

Step 3: Transfer clients to a new dealer group

Tick ✓ relevant box

- My client(s) is (are) transferring with me to the new dealer group. Please find attached a signed letter of release from each of my client(s) or from an authorised signatory (or authorised signatories) of my previous dealer group authorising the transfer of the listed client(s).
- My client(s) is (are) not transferring with me to the new dealer group.

Step 4: Signatures

- This form must be signed in accordance with the signing instructions held on file.

Please process this request in accordance with the above instructions.

Name

Date

 / /

Signature