

Appoint, Change or Cancel a Financial Adviser Form

Use this form if you are an existing investor and wish to appoint, change or cancel your Financial Adviser. You can also use this form to change their details (such as their address) or to start or change the way your financial adviser is paid from your investment.

Please complete all sections in BLOCK letters and using a black pen. If you make an error while completing this form, do not use correction fluid, cross out your mistake and initial your changes.

HOW TO COMPLETE THIS FORM

Step 1 Instructions if you are appointing, changing or canceling a financial adviser.

If you wish to appoint, change or cancel a financial adviser, the following needs to be completed:

- write your account number and account name in **section 1** as it appears on the latest statement
 - complete **section 2** 'Appoint, change or cancel a financial adviser'
 - sign the form as per the 'Signing instructions' in **section 5**
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Step 2 Instructions if you are changing the way your financial adviser is paid from your investment.

If you want to change the way your financial adviser is paid from your investment, the following needs to be completed:

- write your account number and account name in **section 1** as it appears on the latest periodic or transaction statement
 - sign the form as per the 'Signing instructions' in **section 5**
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Step 3 Sign and send your documents to the below address.

You can return the original forms by post, or a scanned copy of the signed document to the details below:

Email*: copia_transactions@unitregistry.com.au

Post: GPO Box 804
Melbourne
Vic 3001

* Please include your account number in the subject line of your email.

1. INVESTOR DETAILS

Account number

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Investor name

2. APPOINT, CHANGE OR CANCEL A FINANCIAL ADVISER

I/We wish to:

Appoint / Change a Financial Adviser

Cancel a Financial Adviser

Please provide details of your Financial Adviser

Dealer group name

Adviser name

AFSL number

Authorised representative number

3. OPERATING YOUR ACCOUNT

Do you want your financial adviser to be able to operate your account?

Yes

No

In general, an appointed financial adviser can do everything you can do with your investment, except appoint another person to operate your account. It is important to tell us promptly if you no longer wish your financial adviser to operate your account, or if your financial adviser changes – Copia Investment Partners and SS&C will keep accepting their instructions until you or they advise us in writing that the appointment has terminated.

Copia Investment Partners or SS&C may suspend or terminate their appointment for any reason considered reasonable, and may change the terms on which they operate your account.

You indemnify us from any loss you, Copia Investment Partners or SS&C suffer as a result of the actions of your appointed financial adviser, and agree to ratify their actions if we ask.

5. SIGNING INSTRUCTIONS

By completing and signing this form, you:

- authorise us to act according with the instructions on this form
- acknowledge that the instructions on this form supersede all previous instructions received by us, and
- agree to indemnify us from and against all losses, costs, expenses, claims, actions or proceedings brought against us in connection with following your instructions on this form.

Individual - where the investment is in one name, the account holder must sign.

Joint Holding - where the investment is in more than one name, all of the account holders must sign.

Companies - where the company has a sole director who is also the sole company secretary, this form must be signed by that person. If the company (pursuant to section 204A of the Corporations Act 2001) does not have a company secretary, a sole director can also sign alone. Otherwise this form must be signed by a director jointly with either another director or a company secretary. Please indicate the capacity in which the form is signed.

Trust - the trustee(s) must sign this form. Trustee(s) signing on behalf of the trust confirm that the trustee(s) is/are acting in accordance with such designated powers and authority under the trust deed.

Power of Attorney - if you have not already lodged the Power of Attorney with us, please attach a certified copy of the Power of Attorney document that includes Certificate of Witness and Statement of Acceptance and Certified Identification Document of the Power of Attorney. I/we attest that the Power of Attorney has not been rescinded or revoked and that the Donor is still living.

Signature of Investor 1, Individual trustee 1, Director or authorised representative

Signature

Please print full name

Date signed

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Company officer (please indicate company capacity)

Director	<input type="checkbox"/>
Company Secretary	<input type="checkbox"/>
Authorised Representative	<input type="checkbox"/>

Signature of Investor 2, Individual trustee 2, Director or authorised representative

Signature

Please print full name

Date signed

 / /

Company officer (please indicate company capacity)

Director	<input type="checkbox"/>
Company Secretary	<input type="checkbox"/>
Authorised Representative	<input type="checkbox"/>