

# Adviser details form

Mason Stevens Limited ABN 91 141 447 207 AFSL 351578

Mason Stevens Super ABN 34 422 545 198 RSE Registration Number R1004168

Trustee: Diversa Trustees Limited ABN 49 006 421 638 RSE License Number L0000635 AFSL License 235153

Only use this form if the advisers AFSL has completed a dealer registration form or distribution agreement.

## Dealer group

**1**

Dealer group name (AFSL holder)	<input type="text"/>
Practice name	<input type="text"/>
AFS Representative Number	<input type="text"/>

## Adviser details

**2**

<input type="checkbox"/> I am a new adviser	<input type="checkbox"/> I have existing access with Mason Stevens, modify my details					
<input type="checkbox"/> Mr	<input type="checkbox"/> Ms	<input type="checkbox"/> Mrs	<input type="checkbox"/> Miss	<input type="checkbox"/> Dr	<input type="checkbox"/> Other	<input type="text"/>
First Name	<input type="text"/>	Middle	<input type="text"/>	Surname	<input type="text"/>	
Date of birth	<input type="text" value="DD / MM / YYYY"/>					

A mobile number is required to finalise your Mason Stevens online access due to two-factor authentication requirements. Incomplete details may result in a delay.

Mobile (mandatory)	<input type="text"/>	Email address	<input type="text"/>
Work phone number	<input type="text"/>	<input type="checkbox"/> Receive trade advice emails	

### Access level

<input type="checkbox"/> Read/write	<input type="checkbox"/> Read only
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### Access visibility

<input type="checkbox"/> Practice (visibility over all clients)	
<input type="checkbox"/> Specific adviser/s (please list)	
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Adviser (individual visibility)	

Accounting System	<input type="checkbox"/> BGL	<input type="checkbox"/> CLASS
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CRM	<input type="text"/>
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## Practice details

3

### Business address (PO Box is not acceptable)


Suburb

State

Postcode

Country

### Postal Address


Suburb

State

Postcode

Country

## Adviser declaration

The adviser named on this form is bound by the terms and conditions of the distributor registration form or distribution agreement and is defined as a Representative.

Signature

Full name

Date

