

# Change of account details

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

 **This form can be used for Investment Service and Super/Pension. Please provide new details as required and supporting documentation where indicated.**

Account code

Account name

## New contact details (complete applicable fields)

**1**

### A. New residential/registered address

  
  

Suburb  State  Postcode

Country

### B. New mailing address

  
  

Suburb  State  Postcode

Country

### C. New contact telephone

Home  Work

Mobile

### D. New email address(es)\*

Email 1

Email 2

Email 3

\*Any email address(es) provided will have the authority to issue account instructions and receive correspondence.



## Tax File Number (TFN) and tax residency details

2

Are you an Australian resident for taxation purposes?

Yes  No

If no, please state your country of residence.

Tax File Number

Australian Business Number\*

\*Investors can only provide an ABN instead of a TFN when the investor is an entity and not an individual.

## Change of name and/or date of birth

3



Please provide additional Certified Supporting Documentation (refer to page 3 for more information).

### A. Old name

Mr  Ms  Mrs  Miss  Dr  Other

First Name  Middle  Surname

Old Signature

### New name

Mr  Ms  Mrs  Miss  Dr  Other

First Name  Middle  Surname

New Signature

### B. Old date of birth

### New date of birth

## Signatures

4

All investors must sign. Please attach extra pages if necessary.

Signature

Full name

Date

Signature

Full name

Date



## Certified Supporting Documentation

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Certified Supporting Documentation includes:

- » Marriage Certificate
- » Deed Poll / Change of name certificate
- » Decree nisi or Divorce certificate
- » Birth Certificate (change of date of birth only)

**Certified copies (no more than 3 months old) of these documents must be provided unless otherwise specified.** A certified copy must have the certifier's signature, printed name, date, qualification and the following statement in original ink: "I, [full name], as [category of persons listed below], certify that this [name of document] is a true and correct copy of the original".

Documents may be certified by a lawyer, judge, magistrate, a chief executive officer of a Commonwealth court, Justice of the Peace, notary public, police officer, an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public with two or more years experience), an Australian consular officer or an Australian diplomatic officer, an officer with 2 or more continuous years of service with a financial institution, an officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more continuous years of service with one or more licensees, a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership.

Where any document relied on as part of the procedure is in a language that is not English, it must be accompanied by an English translation prepared by an accredited translator.

Certified copies of a driver's licence should show current residential address, including any changes.

**Any certified documents must be clear and legible to be accepted.**

Please return the completed and signed form to Mason Stevens by:  
Email: [wealth@masonstevens.com.au](mailto:wealth@masonstevens.com.au) | Fax: 02 8270 0298  
Post: Mason Stevens Level 26, 420 George Street, Sydney NSW, 2000

**Please note: only originally signed and posted forms will be accepted for change of email and change of name.**

