Service request form
Changes to an account

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

Use this form to update the details on your Mason Stevens Global Investment Service account or your Mason Stevens Super account.

Please use this form if you would like to update any of the following details for an account:

1. Add or remove a bank account (all investors including trustees or directors must sign)
2. Change the investor status (wholesale, retail or professional investor)
3. Change of address
4. Change of Trustee

Checklist:

- ☐ Signed and dated by the authorised signatories for the account (specified by the 'Authorised Signatory' form)
- ☐ Certified copies of supporting documentation provided (if applicable). Please keep all original documents for your own records
- ☐ Advisers to submit this form online as a service request (Adviser home > Work in progress > Service requests)

Account details

Account name

Account number

ONLY COMPLETE THE SECTIONS YOU WOULD LIKE TO CHANGE

Bank account change 1

Note: Signatures are required from ALL parties (individuals, trustees or directors) for any changes to bank account details.
This supersedes the Authorised Signatory form where 'Any to sign' has been selected.

If you wish to add a foreign bank account, please use the 'Change of nominated bank account form'.

☐ Remove existing bank account

Bank account name

BSB Account number

☐ Add new bank account

Bank account name

BSB Account number

Please ensure that the nominated bank account is in the name of the investor/s as according to the type of account, for example:

Name of the individual or joint investors
Name of the trustee/s of the super fund or trustee/s <ATF super fund name>
Name of the trustee/s of the trust or trustee/s <ATF trust name>
Name of the corporation

Mason Stevens does not facilitate withdrawals to a bank account in the name of a third party, known as a third party payment.
Mason Stevens will be conducting a call-back, where the full bank account details must be read out and confirmed over the phone.

Investor status change 2

Existing status (select one)

☐ Retail ☐ Wholesale ☐ Professional investor

New status (select one)

☐ Wholesale	DD / MM / YYYY	Date signed	☐ Sophisticated investor certificate must be enclosed
☐ Retail	DD / MM / YYYY	Date client signed	☐ Statement of advice must be enclosed
☐ Professional investor	DD / MM / YYYY	Date signed	☐ Professional investor certificate must be enclosed

Change of address 3

This change will be updated for the account, and will not impact the individual clients, companies, members, directors, beneficiaries or Trustees mentioned.

Current address on file

☐ Residential address ☐ Mailing address ☐ Registered address

Suburb State Postcode

Country

New address

☐ Residential address ☐ Mailing address ☐ Registered address

Suburb State Postcode

Country

Change of trustee 4

Complete this section to change the trustee/s on your trust (including SMSF) account.

New individual trustees or directors of a corporate trustee are required to sign this section. You must also attach any supporting documentation listed below.

Current account name

New account name

Signatures of new trustees or directors of corporate trustee

Signature

Signature

Full name

Full name

Date

DD / MM / YYYY

Date

DD / MM / YYYY

For a change of trustee/s on your trust (including SMSF) account, copies of the following must be provided:

» Full ASIC Extract or Certified Deed of Change of Trustee or Certified Minutes of the Meeting or Certified Director/Trustee Resolution or Certified Deed of Amendment or Certified Deed of Variation

» Certified ID - Director (*if there has been a change)

» Details of New Director – Email, mobile, TFN, Town/ City of Birth, residential address

» Confirm whether the Nominated Bank Account Name changed

Signed by authorised signatories

Individual 1 / Trustee 1 / Director 1

Full name

Signature

Date

DD / MM / YYYY

Capacity

- [ ] Individual
- [ ] Director
- [ ] POA / Representative
- [ ] Trustee

Individual 2 / Trustee 2 / Director 2

Full name

Signature

Date

DD / MM / YYYY

Capacity

- [ ] Individual
- [ ] Director
- [ ] POA / Representative
- [ ] Trustee

Individual 3 / Trustee 3 / Director 3

Full name

Signature

Date

DD / MM / YYYY

Capacity

- [ ] Individual
- [ ] Director
- [ ] POA / Representative
- [ ] Trustee

Individual 4 / Trustee 4 / Director 4

Full name

Signature

Date

DD / MM / YYYY

Capacity

- [ ] Individual
- [ ] Director
- [ ] POA / Representative
- [ ] Trustee

Individual 5 / Trustee 5 / Director 5

Full name

Signature

Date

DD / MM / YYYY

Capacity

- [ ] Individual
- [ ] Director
- [ ] POA / Representative
- [ ] Trustee

Individual 6 / Trustee 6 / Director 6

Full name

Signature

Date

DD / MM / YYYY

Capacity

- [ ] Individual
- [ ] Director
- [ ] POA / Representative
- [ ] Trustee

Note for advisers:
Please log in online and submit this form via the Service Request screen.
(Adviser home > Work in progress > Service requests)