Service request form

Changes to personal client details

Mason Stevens Pty 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

Please use this form if you would like to update any of the following personal details: (note that this form is for end clients only. For updates to personal details of advisers and/or their support staff, please use the following forms: Adviser Supports should use the 'Authorised Person form' and Advisers should use the 'Adviser Details form')

1. Address
2. Email
3. Telephone number
4. TFN / Tax residency status
5. Name or date of birth

Checklist:

- ☐ Signed and dated by the client
- ☐ 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)

Client details

Client's full name

Account number (optional)

Client ID (your client ID can be found on your login dashboard > account details)

Capacity ☐ Individual ☐ POA / Representative ☐ Trustee ☐ Director

ONLY COMPLETE THE SECTIONS YOU WOULD LIKE TO CHANGE

Address change 1

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

Email change 2

Please note that when using a digital signature on this form, only the "previous email address" will be accepted to sign the form.

Previous email address

New email address*

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

Telephone/mobile number change 3

Previous telephone/mobile number

New telephone/mobile number

Tax File Number (TFN) / Tax residency change 4

Are you an Australian resident for taxation purposes? ☐ Yes ☐ No If no, please state your country of residence.

Tax File Number (or foreign Taxpayer Identification Number)

Australian Business Number*

*Investors can only provide an ABN instead of a TFN when the investor is an entity and not an individual. Please note that ACN are not accepted.

Name and date of birth change 5

Please note, you will need to provide us with certified copies of the following documents. Please refer to the guide below for certification requirements.

Reason for name change:

☐ Marriage – please attach a certified copy of your birth certificate and marriage certificate

☐ Deed poll – please attach a certified copy of your birth certificate and your change of name registration certificate

☐ Divorce – please attach a certified copy of your birth certificate and your divorce or new marriage certificate

☐ Incorrect spelling of name – please attach a certified copy of either your driver's licence or passport

☐ Change of business name – please attach the ASIC change of business name certificate

☐ Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Other

Existing name (please provide your full name)

Existing signature

☐ Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Other

New name (please provide your full name)

New signature

Old date of birth

DD / MM / YYYY

New date of birth

DD / MM / YYYY

Certified copies of documents

Certified copies (no more than 12 months old) must have the certifier's signature, printed name, date, qualification and the following statement: "I, [full name], as [category of persons listed below], certify that this [name of document] consisting of [x] pages, is a true and correct copy of the original". If the number of pages is not stated, each individual page needs to be certified as a true and correct copy of the original.

Documents may be certified by:

- A permanent employee of Australia Post with two or more years of continuous service
- Australian Consular Officer or Australian Diplomatic Officer
- A lawyer, judge, or magistrate
- A police officer
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having five or more years continuous service with one or more licensees
- A finance company officer with two or more years of continuous service (with one or more finance companies)
- A Justice of the Peace
- A notary public officer
- CEO of a Commonwealth court
- A member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with two or more years of continuous membership

Client's signature

Full name

Signature

Date

DD / MM / YYYY

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