

# Service request form

## Changes to personal client 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

**Please use this form if you would like to update any of the following personal details:**

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

**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  Client ID (optional)

Capacity  Individual  POA / Representative  Trustee  Director

**ONLY COMPLETE THE SECTIONS YOU WOULD LIKE TO CHANGE**

### Address change

**1**

**Previous address**

- 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

Previous email address

New email address

## Telephone number change

3

Previous telephone number

New telephone number

## TFN / Tax residency change

4

Tax ID number

Tax residency country

## Name 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 – ASIC change of business name certificate

Existing name

Existing signature

New name

New signature

Please provide a new 'Authorised Signatory' form with the updated name (and signature) (located in the literature library)

- Authorised signatory form



## 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

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Full name

Signature

Date

### Note for advisers:

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

