

# Portfolio Management Service Agent Appointment Form

Please complete this form if you wish to appoint an agent (other than your financial adviser) to operate your Portfolio Management Service account.

Investor surname name or company name

Investor given name(s)

ABN/ARBN

 -  -  - 

Joint investor surname

Joint investor given name(s)

Account name

## Section 1: Agent details

I/we hereby appoint the following agent to exercise all the powers I/we have in respect of my/our account

Agent's name

Agent's relationship to investor/s

If agent's appointment is pursuant to Power of Attorney, please provide certified copy of Power of Attorney with this form.

Agent's contact number

Agent's email address

Agent's street address

Suburb

State

Postcode

to be my/our agent to exercise all the powers I/we have in respect of my/our account in the Portfolio Management Service.

# Portfolio Management Service Agent Appointment Form

## Section 2: Agent declaration and signature

Agent's signature

Date

 /  / 

Partnership and Body Corporate signatures (to be signed by authorised officers)

Date

 /  / 


Date

 /  / 

## Section 3: Investor declaration and signature

I authorise Australian Executor Trustees to accept investment directions from the above nominated agent, or any member of the agent's staff nominated by the agent. Australian Executor Trustees is authorised to act on such direction until I notify Australian Executor Trustees in writing otherwise.

Investor signature

Date

 /  / 

Investor signature

Date

 /  / 

Please return to Australian Executor Trustees Limited by:

**Fax** 1800 781 166  
**Email** forms@aetlimited.com.au  
**or Post** Australian Executor Trustees Limited  
 Administration Services  
 GPO Box 546  
 Adelaide SA 5001

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