

## Investor details

Investor surname or company name

Investor given name

Joint investor surname

Joint investor given name

Account name

Account number

## Section 1: Please select only one of the boxes below then complete Section 2

- I changed the address and banking details of all assets listed in Section 2 to:  
C/-Australian Executor Trustees Limited  
GPO Box 546  
Adelaide SA 5001  
and would like to record the assets in my PMS account. Please complete Section 2 and 3 **or**
- I confirm that I have transferred all of the investments listed in Section 2 into the same name and address as my PMS account and I would like AET to record these assets in my account. Please complete Section 2 and 3 **or**
- I confirm that I have asked my other provider to transfer the wholesale managed funds listed in Section 2 to my PMS account. Please complete Section 2 and 3.

Australian Executor Trustees is bound by the National Privacy Principles. More information about privacy matters can be found in the current Product Disclosure Statement for your product. If you would like a copy of the Privacy Policy or have any questions in relation to privacy, please contact us on 08 8127 1900 and ask for the Privacy Officer.

Australian Executor Trustees Limited ABN 84 007 869 794 AFSL No 240023 RSE Licence No L0002554

**Part of Australian Wealth Management**

