AET My Portfolio
Compensation Client access request form

Australian Executor Trustees

Please complete this form if you require access to AET My Portfolio.

Section 1: Client details

Account name

Account number

Email address

Access required:

- ☐ Client
- ☐ Family member

Name

Surname

Relationship to client

Email address

I request access to AET My Portfolio and the issue of my login ID and password. I confirm I have read, and agree to be bound by Australian Executor Trustees' terms and conditions for AET My Portfolio as amended from time to time.

Signature

✗

Date / /

Section 2: Relationship Manager confirmation (Office use only)

I confirm that the client information is correct.

Relationship Manager Name

Signature of Relationship Manager

✗

Date

/ /

Please return to us by email at forms@aetlimited.com.au

We collect the information in this form for the purpose of updating the information it holds about you. The information provided in this form will be used in accordance with the Privacy Policy at www.aetlimited.com.au/privacy.

PLA-16751 (52288) 0120