

# Change of Details Form

Use this form to provide us with any changes to your personal details. Print clearly in BLOCK LETTERS.

If you would like to add a financial adviser to your account and have adviser service fees deducted, and if you want to update your adviser account access, please complete the Adviser Details Form available at [russellinvestments.com.au/forms](http://russellinvestments.com.au/forms)

## 1. Personal details

a. Title (please select)

Mr  Mrs  Miss  Ms  Dr  Other  >

b. Surname

c. First name(s)

c. Previous surname (leave blank if no change)<sup>1</sup>

c. Previous first name(s) (leave blank if no change)<sup>1</sup>

d. Date of birth (DD MM YYYY)

e. Sex (please select)

Male  Female

f. Member number

Tick this box if there are NO changes to your personal contact details below.

g. Address

State    Postcode

h. Work telephone

i. Home telephone

j. Mobile telephone<sup>2</sup>

k. Primary/personal email address<sup>3</sup> (Give us your email address to receive all future communications electronically.)

Secondary/work email address<sup>3</sup>

1 If you have changed your name, you will need to provide a certified copy of your marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registry of your state or territory. Information about who is authorised to certify documents is given at the end of this form.

2 We may SMS you from time to time.

3 **By providing your email address, you are advising us that online communication is your preferred method of communication. Going forward, we will email you with information and also advise when a communication has been added to your online account. We will issue paper communications rarely or where your email address no longer works. You can change your preferred method of communication at any time by calling us or logging in to your online account at [russellinvestments.com.au/login](http://russellinvestments.com.au/login)**

**2. Search for your super**

Tick this box to provide consent.

By ticking this box, you are consenting to the Trustee of the Russell Investments Master Trust (the Fund, iQ Super) using your Tax File Number (TFN) to search for other super accounts you may have, now and in the future, using a facility provided by the Australian Taxation Office (ATO). We will automatically consolidate any ATO-held super (known as Lost or Unclaimed money). If we find any super with other funds we will let you know, so you can decide if you want to transfer them into your iQ Super account.

**3. Adviser contact details (if you do not have a financial adviser, go to section 4)**

Tick this box to remove the current adviser on file. (You should speak to your adviser about this decision.)

If you would like to add a financial adviser or change any of your adviser details, please complete the Adviser Details Form available at [russellinvestments.com.au/forms](http://russellinvestments.com.au/forms)

**4. Declaration and signature**

**I acknowledge and declare:**

If I have an adviser, I understand that:

- The Trustee may provide information on the status of my account balance and investments to my nominated financial adviser.
- If I have completed the **Adviser service fee** section of this form, I:
  - i) have read and agree to the adviser service fee information in the current PDS; and
  - ii) request that the Trustee redeem any of my units on or about the last business day of each month to pay my nominated financial adviser the ongoing adviser service fee I have selected on this form and direct the Trustee to pay the proceeds of this redemption to my nominated financial adviser.
- I confirm that any changes to the adviser account access authority is correct.

I have read and understood the contents of this form and have checked that all the information I have provided on this form is correct.

Member signature

Date (DD MM YYYY)

□	□	□	□	□	□	□	□	□	□
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Member name

□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□	□
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## 5. Important information: certification of documents

### Certification of documents

All copied pages of original proof of identification documents and any copies of other required documents (including any linking documents) need to be certified as true copies by an individual approved to do so. You may find it easier to arrange for certification of your documents before you depart Australia.

Make a photocopy of your original document and then take both documents to one of the following people to be certified. The person who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy of original document' followed by their signature, printed name, qualification (eg Justice of the Peace) and the date.

The Fund will only accept documents certified by one of the following.

#### For documents certified within Australia:

- » Medical practitioner
- » Pharmacist
- » Police officer
- » Justice of the Peace
- » Legal practitioner
- » Notary public officer
- » Registrar or Deputy Registrar of a court
- » Judge of a court
- » Magistrate
- » Clerk of a court
- » Chief Executive Officer of a Commonwealth court
- » Sheriff
- » Sheriff's officer
- » Australian Consular Officer or an Australian Diplomatic Officer
- » Permanent employee of Australia Post with two or more years of continuous service
- » Agent of Australia Post who is in charge of an office supplying postal services to the public
- » An officer with, or authorised representative of, a holder of an Australian Financial Services license, having two or more years of continuous service with one or more licensees.

#### Please note:

- » In different circumstances, there may be other people who are able to certify documents. However, in the interests of protecting the entitlements of members of the Fund, we will only be able to accept documents which have been certified by a person in the above list.
- » We may be required to ask for further identification from you in order to meet relevant regulatory requirements if we are unable to verify you using the information you have provided.

**» Please return this form to:**  
**iQ Super by Russell Investments**  
Locked Bag A4094  
Sydney South NSW 1235

#### You can also contact us as follows:

Toll free on **1800 555 667**

Operating hours are from Monday to Friday, 9am – 5pm (AEST)

[iq@russellinvestments.com.au](mailto:iq@russellinvestments.com.au)  
[russellinvestments.com.au/super](https://russellinvestments.com.au/super)