

**INSTRUCTIONS: PLEASE EMAIL COMPLETED AND SIGNED FORM TO YOUR ADVISER OR SETTLEMENTS@PHILLIPCAPITAL.COM.AU  
ADVISER TO VERIFY CHANGES BY PHONE OR AS REQUIRED**

### SECTION 1 - APPLICATION DETAILS

Name of Account: .....

Account Number: .....

Account Designation: .....

### SECTION 2 - CHANGE REQUEST

Please place an '✓' against the change(s) you require. You can complete more than one section.

Change of Contact Details. Complete Section A

Change of Address Details. Complete Section B

Notification of TFN/TIN/ ABN and Tax Residency. Complete Section C

Change of Company Name. Complete Section D

Declarations and Signing. ALL CLIENTS MUST COMPLETE SECTION E

### SECTION A - CHANGE OF OR ADDITIONAL CONTACT DETAILS

Please provide your NEW Contact details below:

Contact Name ..... Mobile ..... Business Phone .....

Home Phone ..... Email .....

If this is a replacement of a contact person, please provide name of contact who is superseded.

### SECTION B - CHANGE OF ADDRESS DETAILS

Please indicate the types of address changes:

Residential Address *Please note you cannot use a PO BOX Address.*

Registration or Postal Address

Registered Address for Company as notified to ASIC or Foreign Regulator *Please note you cannot use a PO BOX Address.*

Contact/Correspondence address for Company

Previous Address

.....  
Street Number & Name Suburb State Country Postcode

New Address

.....  
Street Number & Name Suburb State Country Postcode

**Please attach a document evidencing the change of address; eg. utility bill or bank statement**

**SECTION C - NOTIFICATION OF TFN, TIN, ABN, AND TAX RESIDENCY**

Tax File Number (TFN) ..... Australian Business Number (ABN) .....  
Australian Tax Resident As registered with the ATO

Tax Identification Number (TIN) .....  
Foreign Tax Resident number allocated for tax purposes;

**Change of Tax Residency**

I **am now** an Australian Tax resident

I am **NOT** an Australian Tax resident and have provided my TIN above I understand that I must complete the **CRS Self Certification Form** available at <http://www.phillipcapital.com.au/client-services/account-forms/>

Date I changed my tax residency ..... Countries of Residence .....  
If not Australia

**SECTION D - CHANGE OF COMPANY NAME**

Previous name: ..... New name: .....

*If a foreign company, provide Certificate evidencing change of name.  
If the account is to be transferred to a new company, a new account application must be lodged.*

**SECTION E - DECLARATIONS AND SIGNING BY ALL ACCOUNT HOLDERS**

To: PhillipCapital

I/We declare that:

- (1) All details provided by me/us in this form are true and correct, that I/we are authorised to provide the information including personal information to PhillipCapital and to sign this form and I/we authorise PhillipCapital to give effect the change/s.
- (2) If signing under Power of Attorney, I/we verify that, at the time of signing I/we had not received notice of revocation of that Power of Attorney. A certified copy of the Power of Attorney has been enclosed with this form.  
(if not previously provided).

If the account is in joint names or trust, all account holders must sign. If the information is personal information about more than one account holder, then every account holder must provide a separate form signed by all account holders.

..... Name of Signatory	..... Name of Signatory	..... Name of Signatory
..... Signature (Director/Power of Attorney/Individual/Trustee)	..... Signature (Director/Secretary/Individual/Trustee)	..... Signature (Individual/Trustee)
..... Date:	..... Date:	..... Date:

*Privacy Act 1988 Information Collection Statement*

*PhillipCapital is legally bound by the Privacy Act and Australian Privacy Principles.*

*We are committed to a culture that respects the privacy of individuals by ensuring the security of their Personal Information. PhillipCapital's Privacy Policy contains further details on its information handling practices and explains in more detail what personal information it collects, methods of collection, purposes of collection, retention, use and disclosure, when it may disclose your Personal Information, who it discloses your Personal Information to, the countries it may disclose your Personal Information to and how you may opt out from receiving marketing information.*

*The Privacy Policy also explains your rights including how you may access and request correction of your Personal Information or complain about a breach of the Australian Privacy Principles by PhillipCapital. The Privacy Policy is available at [www.phillipcapital.com.au](http://www.phillipcapital.com.au)*

**INTERNAL OFFICE USE ONLY - I confirm that**

- 1. I have completed the Call back process to perform an Account Verification using the contact number from the Client Database.
- 2. I am able to verify the client and confirm the instruction is accurate.

Date validated: .....

**Adviser Name**

**Signature of Adviser**