



## Contents and instructions

Please complete this form if you wish to make changes to your address, the name in which your account is held, change or cancel a Power of Attorney or your bank account details. You should also complete this form if you wish to make changes or cancel one of your regular payment facilities including regular savings plan, pension payments or your regular withdrawal.

You can also complete this form if you wish to notify us of a change to your financial adviser and/or adviser remuneration arrangements.

Please ensure you complete Steps 1, 13 and 14, plus the step(s) that relate to the change(s) you would like to make. Incomplete requests which require follow-up may result in processing delays.

If you need assistance with completing this form, please contact your financial adviser or Summit Client Services on 1800 622 772.

### Step 1 – Your client details

Complete the full name in which the investment is held, including client reference number. Also, please complete your name and client reference number in the boxes on the top of each page.

### Step 2 – Change of address

Complete both your new residential address and postal address if different. Also include all relevant contact numbers.

### Step 3 – Change of name

Complete this section if you wish to change the name in which your portfolio is held. Please also provide copies of relevant documentation, such as: a copy of the marriage certificate if the change of name is due to marriage, or a copy of the certificate of change of name if the change of name is by deed poll.

### Step 4 – Add, change or cancel Power of Attorney

Use this section if you wish to add a new Power of Attorney or change or cancel an existing Power of Attorney on your portfolio. Tick the relevant box, and complete the details of your new Power of Attorney (if applicable). Please ensure you sign the Client authorisation in Step 13 and send an original signed copy of this form to the address below.

If you are appointing a new Power of Attorney, also send an original certified copy of the new Power of Attorney to the address provided below.

### Step 5 – Change of bank account details

Use this section if you wish to change the bank account details that we hold on file for your pension payments, your regular withdrawal arrangements or your regular savings plan. Please note that if you are changing your bank account details, we require an original signed copy of this form. Please send it to the address provided below.

### Step 6 – Change to financial adviser remuneration

Complete this section if you agree to a new fee rate with your financial adviser.

### Step 7 – Change to review report frequency

Use this section if you wish to change the frequency of your review reports.

### Step 8 – Change to regular savings plan

Use this section if you wish to change the details of or cancel your regular savings plan.

Note: If you cancel your regular savings plan, you will also need to cancel your direct debit arrangement with your bank/financial institution.

Five working days notice is required for alterations to your regular savings plan.

### Step 9 – Change to regular savings plan indexation

Use this section to add, alter or cancel indexations on your portfolio.

### Step 10 – Change to pension payments

Use this section if you wish to alter your regular pension payments.

Pension payments are subject to minimum/maximum amounts. Please consult your financial adviser before completing this section.

### Step 11 – Change to regular withdrawal facility

Use this section if you wish to alter or cancel your regular withdrawal facility.

### Step 12 – Change of financial adviser

Use this section if you would like to appoint a new financial adviser.

### Step 13 – Client authorisation

Sign and date the form.

### Step 14 – Financial adviser

Your financial adviser should complete their name and adviser number.

### Once completed, please send this form to:

**Summit Service**  
**GPO Box 2754**  
**MELBOURNE VIC 3001**

**If you have the Generations fax facility, this form can be faxed to Summit on 1800 780 081. Please note that we require an original copy of this form if you are appointing a new Power of Attorney in Step 4 or changing your bank account details in Step 5. Therefore, you cannot use the fax facility in these instances.**

**Step 1 – Your client details**

Client name

 -  - 

Client reference number (eg 0012345-L2-01)

**Step 2 – Change of address**

**New residential address**

Street number and name

Town/Suburb

State

Postcode

**New postal address (if different from above)**

Street number and name

Town/Suburb

State

Postcode

Home telephone

Work telephone

Facsimile

Mobile

Email address

**Step 3 – Change of name**

**New name**

Mr  Mrs  Miss  Ms  Other please specify

Surname

Given name(s)

Former signature

New signature

**Step 4 – Add, change or cancel Power of Attorney**

- I wish to nominate the below person as my Power of Attorney. Please note that you will need to send a certified copy of the new Power of Attorney and the original signed copy of this form to the address listed on the bottom of page 1.
- I wish to revoke my existing Power of Attorney and confirm that I will take responsibility for all future notifications or changes.
- I wish to revoke my existing Power of Attorney and nominate the person below as my new attorney. Please note that you will need to provide a certified copy of the new Power of Attorney.

Mr  Mrs  Miss  Ms  Other please specify

Surname

Given name(s)

**Postal address**

Street number and name

Town/Suburb

State

Postcode

Home telephone

Work telephone

Facsimile

Mobile

Email address

**Step 5 – Change of bank account details**

- I wish to receive my pension by direct credit to my bank account.
- I wish to change my bank/financial institution account details for an existing direct credit arrangement. Please note that if you are changing your bank account details, we require an original signed copy of this form.

Payee account name

Name of bank/financial institution

Bank/financial institution branch name

 - 

BSB number

Account number

Signature of account holder(s)

Client name

 -  - 

Client reference number (eg 0012345-L2-01)

**Step 6 – Change to financial adviser remuneration**

**Entry fee option**

Commission on additional investment(s)  0 – 4.40% (including GST)

OR

**Deferred entry fee option**

0.0%  1.1%  2.2%  3.3%  4.4% (including GST)

Adviser review fee  % 0 – 1.65% (including GST)

Note: You cannot change the fee structure between entry fee and deferred entry fee on your portfolio.

**Step 7 – Change to review report frequency**

**Review reports**

Please nominate the month and frequency. Month   Half year  Year

Note: The first review report will be issued 6 or 12 months (as nominated) after the selected month.

**Step 8 – Change to existing regular savings plan details**

Please indicate the source of your investment.

**Generations Personal Super**

	Total		
Personal contributions*	<input type="text"/>		
		Components	
Employer contributions	<input type="text"/>	= <input type="text"/>	<input type="text"/>
		Superannuation Guarantee Contribution (SGC)	Salary sacrifice Employer
Spouse contributions	<input type="text"/>		
<b>Total amount to invest</b>	<input type="text"/>		

If you have standing purchase instructions, all contributions will be invested according to these instructions unless otherwise specified.

\* If you intend to claim a tax deduction for personal superannuation contributions, you must provide the trustee valid notice of your intent to claim the deduction which will be sent to you at the end of each financial year. If the trustee does not receive a valid notice, all personal contributions will be allocated as non-concessional. The trustee is required to acknowledge receipt of the notice and you must have this acknowledgement before you claim a tax deduction.

**Generations Investment Portfolio**

Non-super contribution

**Payment frequency**

Fortnightly  Monthly  Quarterly

Date of payment (1st to 28th)  / / OR  Last day of the month Commencing:

**Cancellation of regular savings plan**

I wish to cancel my regular savings plan.

Note: You will also need to cancel the regular payment authority with your bank/financial institution.

Client name

 -  - 

Client reference (eg 0012345-L2-01)

**Step 9 – Change to regular savings plan indexation**

Indexation:  Yes Type:  CPI rate OR  % Nominated percentage (up to 7.0%)  
 No

**Step 10 – Change to pension payment(s)**

Minimum pension OR  Maximum pension (NCAPS only) OR Specified annual pension \$

**Payment frequency**

Monthly  Quarterly  Half yearly  Annually

Date of first pension payment (5th to 28th)  /  /  OR  Last day of the month

Indexation (subject to legislation):  Yes Type:  CPI rate OR  % Nominated percentage (up to 7.0%)  
 No

(Not available if minimum or maximum pension amount has been selected.)

**Step 11 – Change to regular withdrawal facility**

**Payment amount**

Specified payment \$

**Payment frequency**

Monthly  Quarterly  Half yearly  Annually

Date of first payment (5th to 28th)  /  /  OR  Last day of the month

Indexation (subject to legislation):  Yes Type:  CPI rate OR  % Nominated percentage (up to 7.0%)  
 No

**Cancellation of regular withdrawal facility**

I wish to cancel my regular withdrawal facility.

**Step 12 – Change of financial adviser**

**New adviser name**

 

Surname

Given name(s)

Company

**Postal address**

   

Street number and name

Town/Suburb

State

Postcode

  

Home telephone

Work telephone

Facsimile

 

Mobile

Email address

**Step 13 – Client authorisation**

   /  / 

Client signature

Date

**Step 14 – Financial adviser**

 

Adviser name

Adviser number