

# Change of Details



This form may be lodged with Uniting Financial Services or posted to:

**Uniting Financial Services**  
PO Box A2178  
Sydney South NSW 1235



## Helpful hints for completing this application

- A form is required for EACH person or business, i.e. a joint investment will require two forms if both parties have amendments to be advised.
- To enable Uniting Financial Services to amend details held please complete the following as applicable.



## Need help or have a question?

Call us on **1300 133 673**

Visit us at [unitingfinancial.com.au](http://unitingfinancial.com.au)

Email us at [contactus@unitingfinancial.com.au](mailto:contactus@unitingfinancial.com.au)

Please use **BLOCK LETTERS** in **BLACK OR BLUE PEN ONLY** and  tick required choices

## STEP 1 – OLD CONTACT DETAILS

Investor I.D. (if known)

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Full name

Your OLD address

Suburb

State

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Postcode

--	--	--	--	--	--

## STEP 2 – NEW CONTACT DETAILS

Residential address

Suburb

State

--	--	--	--

Postcode

--	--	--	--	--	--

Postal address (if different from above)

Suburb

State

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Postcode

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Telephone

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Mobile

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Fax

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Email

**STEP 1** **STEP 2** **STEP 3** **STEP 4**

## STEP 3 – CHANGE OF NAME

Please provide certified copies of all supporting documents (e.g. Marriage certificate, deed poll document, birth certificate)

Previous name

New name

PREVIOUS signature

SIGN HERE

NEW signature

SIGN HERE

## STEP 4 – AUTHORISATION

I authorise the changes detailed above.

### PRIVACY

I/We consent to the collection, use and disclosure of our personal information as detailed in the *Financial Services Guide*, *Product Disclosure Statement* and the *Product Information Brochure*.

### COLLECTION, USE AND DISCLOSURE OF PERSONAL INFORMATION

Information is collected from you to administer and manage your investments and if some or all the information is not collected then it may not be possible to administer your investment. We may use your personal information to provide you with information and marketing material about other products and services provided by Uniting Financial Services. We do not provide your information to any other organisation without your consent, other than those organisations that provide administrative or other services as part of the operation of our business. You can view and obtain our *Privacy Policy* from our website: [unitingfinancial.com.au](http://unitingfinancial.com.au)

### MARKETING OPTIONS

From time to time, we may contact you to notify you about, or seek feedback on, our products and services. If you don't want us to contact you, or to receive communication items, simply tick here:  No thanks

Signatory 1

SIGN HERE

Print full name

Date  /  /

Signatory 2

SIGN HERE

Print full name

Date  /  /

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STEP 1  STEP 2  **STEP 3**  STEP 4