

# Appoint or change your adviser

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right by your side

## Use this form if you want appoint, change or remove your adviser, or you want your adviser to have limited transaction authority on your Brighter Super account/s.

If you wish a appoint, change or remove the Adviser for your employer plan, complete our *Appoint or change the adviser for your employer plan* form available at [brightersuper.com.au](http://brightersuper.com.au). Your Adviser and their AFS Licensee must be a registered with Brighter Super before they can be nominated as your listed adviser on your Brighter Super account. If your adviser is not registered with Brighter Super or you wish arrange for fees to be paid to your Adviser from your Brighter Super account, you will need to complete the relevant form.

### With a limited transaction authority, your adviser will be able to:

- make additional contributions
- change current and future investment strategies
- change pension payment amounts and frequency
- request information about your account and copies of any documents provided by us in relation to it.

### With a limited transaction authority, your adviser cannot:

- transact via your personal Member Online account
- request a withdrawal or transfer on your benefit
- request a payment to someone other than you. This means any withdrawal requests will only be paid to you or to the bank account previously nominated by you. We can only pay to a bank account in your name or a joint bank account of which you're one of the account holders
- appoint other authorised advisers
- change any fees or charges
- change bank account details for withdrawals or payments
- change your address and contact details.

## Personal Details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

<b>Member number</b> (if applicable)	<b>Given name/s</b>		
<b>Surname</b>			<b>Date of birth</b> / /
<b>Email</b>	<b>Phone number</b>		
<b>Residential address</b>			
<b>Suburb/town</b>	<b>State</b>	<b>Postcode</b>	
<b>Postal address</b> (if different to above)	<b>State</b>	<b>Postcode</b>	

## Important information

### 1. Privacy and personal information

Brighter Super respects your privacy. All personal information collected on this form is protected in line with *Brighter Super's Privacy Policy*. To find out more about how we collect and manage your personal information, please refer to our *Privacy Policy* available from our website [brightersuper.com.au](http://brightersuper.com.au).

## 1 What would you like to do?

Please tick (✓) the box and indicate your choice/s below.

- I would like to remove the financial adviser nominated for my Brighter Super account/s (section 2).
- I would like to replace the adviser nominated on my Brighter Super account/s (section 2 & 3).
- I would like to appoint a financial adviser for my Brighter Super account/s for the first time (section 3).

### Please note:

If you want your adviser to have limited transaction authority on your Brighter Super account/s, ask your adviser to complete sections 3 and 4. You will also need to verify your identity in Section 5.

## 2 Remove or replace your previous financial adviser

Please complete this section if you would like to remove or replace your previous adviser.

**Brighter Super Adviser ID**

**Adviser's full name**

## 3 Nominate your new financial adviser

Complete this section if you wish to appoint a new adviser as the listed financial adviser for your Brighter Super account/s. Your adviser (and their nominated staff and/or representatives) will be able to request and receive information about your Brighter Super account/s, including copies of documents and statements.

Completing this section on its own will not provide your adviser with limited transaction authority. If you want your adviser to have limited transaction authority on your Brighter Super account, please complete section 4 as well.

If you hold more than one account please specify (✓) below which account(s) you would like the changes to apply to:

- I would like to appoint the financial adviser nominated below on all my current Brighter Super accounts.
- I would like to appoint the financial adviser nominated below on the specific account(s) listed below:

Please request your financial adviser provide their details below:

### Adviser's Details

**Adviser's name**

**Brighter Super Adviser ID**

**ASIC<sup>1</sup> financial adviser number**

**AFS<sup>2</sup> Licence number**

**Practice name**

**AFS<sup>2</sup> Licensee name**

**Phone**

**Mobile**

**Email**

**Company address**

**Suburb/town**

**State**

**Postcode**

<sup>1</sup> Australian Securities & Investments Commission

<sup>2</sup> Australian Financial Services

## 4

## Provide your adviser with limited transaction authority

Complete this section if you wish to provide the adviser nominated in section 3 with limited transaction authority on your Brighter Super account.

Please tick (✓) the appropriate box(s) below to confirm your nomination.

- I am appointing the adviser nominated in section 3 with limited transaction authority for my Brighter Super account(s).
- I understand that I am providing legal authority for my adviser (and their nominated staff and/or representatives) to make changes to my Brighter Super account(s) via their Adviser Online account.
- I understand if I change or remove my adviser, any limited transaction authority will be revoked.

### Please note:

By completing this section, you give the authorised adviser (and their nominated staff and/or representatives) the legal authority to make changes to your Brighter Super account(s) via their Adviser Online account. The authorised adviser will be able to change your current and future investment strategies, change your pension payment amount and frequency and request and receive information about your Brighter Super account(s). **Any actions completed by your authorised adviser will be treated as if you had made them personally and you cannot later claim that the acts were not authorised.**

Your authorised adviser (and their nominated staff and/ or representatives) won't be able to change the bank account we have recorded for you, withdraw or transfer your benefit, change your address or contact details, appoint other authorised advisers, change any fees or charges, or use your personal Member Online account.

If you want to authorise us to provide your adviser with limited transaction authority on your Brighter Super account(s), you will need to verify your identity by completing section 5. See our *Proof of identity requirements* info sheet at [brightersuper.com.au](http://brightersuper.com.au) for more details.

## 5

## Verifying your identity

At Brighter Super we take looking after your retirement savings very seriously, which is why you will need to verify your identity before we can provide your authorised adviser access on your new Brighter Super account.

You can confirm your identity by choosing option A or B below.

### Option A

- Electronic verification  
Please provide details of your driver licence or passport below:
- I authorise Brighter Super to use information held by a credit reporting agency to assist in verifying my identity online. **I understand this is not a credit check and will not be stored on my credit file.** I confirm I have read the *Proof of Identity requirements* information available on the Brighter Super website [brightersuper.com.au](http://brightersuper.com.au).

### Licence details

Licence number

State of issue

Card number

### Passport details

Passport number (Australian passport only)

Family name at birth

Place of birth (as shown on your passport)

### Option B

- Certified Identification - Please read the *Proof of identity* info sheet available at [brightersuper.com.au](http://brightersuper.com.au).

## 6 Adviser Declaration

I declare that,

- I accept this appointment and agree to all its terms and conditions as set out in this form, disclosure documents (such as the applicable Product Disclosure Statement, including all documents incorporated by reference), trust deed and governing rules of LGIAsuper Trustee as trustee for LGIAsuper (the fund) trading as Brighter Super.
- I agree to advise the Trustee of any changes to my details, as they occur, and understand that I will need to personally identify myself to the Trustee (in accordance with the Trustee's *Proof of identity* requirements).
- This form will only be accepted if the AFS Licensee has entered into an arrangement with the Trustee, and nominated me as and their authorised representative under that arrangement.
- Any financial advice I have provided (or will provide) under this authorisation will be consistent with the arrangement in place between myself and/or my AFS Licensee and Brighter Super.
- I will advise Brighter Super as soon as is reasonably practicable, and within the time required by Law, if this arrangement, and/or any arrangement to pay an advice fee pursuant to this arrangement from a Brighter Super account, is cancelled.

**Adviser's full name**

**Adviser's signature**

**Date signed**

/ /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

## 7 Member Declaration

I declare that,

- the information I've provided on this form is true and correct.
- I request Brighter Super cancel any authorisation for the adviser nominated in section 2 to act as the adviser for my Brighter Super accounts and revoke any authority for them (and their nominated staff and/or representative/s) to obtain information about and/or transact on my Brighter Super account(s).
- I request Brighter Super cancel any arrangement to deduct an ongoing or fixed-term advice fee from my Brighter Super account(s) payable to the adviser nominated in section 2. I understand that this does not cancel any agreement I have to pay the advice fee to that adviser and/or their AFS Licensee, and that I need to advise them in writing to cancel the arrangement I have with them.
- I am appointing the adviser (and their nominated staff and/or representatives) nominated in section 3 as the adviser for my Brighter Super account(s).
- this authorisation will permit my new adviser to request and receive information about my account(s) including copies of documents and, digital access to my account information through the Brighter Super Adviser Portal, and data feeds from third party software providers detailing information about my account(s) (including transaction history).

**By completing section 4 of this form I declare that,**

- I understand this arrangement will continue until I cancel the appointment in writing.
- I agree the Trustee may cancel this facility or vary these conditions after giving me 14 days' notice in writing.
- I agree to release, discharge, and indemnify the Trustee and its service providers from and against any claims, liabilities and expenses arising out of or in relation to the authorised adviser nominated in section 3 of this form.
- I understand that if I appoint an adviser with limited transaction authority, the exercise of any of the powers by a person reasonably believed by the Trustee or its service providers to be my authorised adviser or to be acting on behalf of my authorised adviser, will be treated as if I had personally exercised those powers.
- I agree that if I appoint an adviser with limited transaction authority, I can't later claim that my authorised adviser, or any person(s) appointed by me acting on behalf of my authorised adviser, was not acting on my behalf.

**Member Signature**

**Date signed**

/ /

Please sign in blue or black pen - Brighter Super does not accept digital signatures on this form.

**Now you have completed this form and signed the declaration, please send it to us by:**

**Email** (scanned copy)  
adviceoperations@brightersuper.com.au

**Post** Brighter Super  
GPO Box 264  
Brisbane Qld 4001

