

Bendigo SmartOptions Appointment of Representative (Financial Adviser Authority)



This form can be used for the following products:

- Bendigo SmartOptions Super®
- Bendigo SmartOptions Pension®

Use this form if you wish to **authorise your nominated financial adviser and their staff (financial adviser)** to operate your account and to give instructions on your behalf in relation to your Bendigo SmartOptions account to Sandhurst Trustees Limited (Sandhurst).

Please complete this form in **black** or **blue** ink using **CAPITAL LETTERS** and where provided, mark answer boxes with an **X**.

Step 1 Member personal details

Member number (if known)

Title Surname

Given name(s)

Date of birth / /

Step 2 Financial adviser details

Important note: If there is an existing financial adviser listed on your account, we will replace his/her details with the financial adviser nominated in this section.

If there is a change of financial adviser, we will cease paying any agreed Member Advice Fee(s) to the financial adviser via his/her dealer group until you instruct us otherwise.

Dealer group name

AFSL No Dealer code (if known)

Adviser name

Adviser code (if known)

Work phone number

Email address

Adviser signature

Date / /

Licensee's stamp

Step 3 Member declaration

- I have read and understood Bendigo and Adelaide Bank Group's Privacy Policy which is available at www.sandhursttrustees.com.au and agree that Sandhurst and Bendigo and Adelaide Bank Group may collect, use and disclose my personal information in accordance with the Privacy Policy.
- I acknowledge and authorise my nominated financial adviser to operate my account and to give certain instructions on my behalf in relation to my account to Sandhurst by any method acceptable to Sandhurst, including electronically.
- I authorise my representative to do the following in relation to my account:
 - Make enquiries about my account
 - Direct Sandhurst to establish/change my investment strategy and/or future cashflow (excluding MySuper members)
 - Alter the amount of my pension payments
- I understand that I still retain full control of my account and acknowledge that the following are some examples of instructions which Sandhurst **will not** accept from my financial adviser:
 - providing a request to withdraw any funds from my account;
 - providing new bank account details;
 - changing my bank account details held on file;
 - authorising any other person to operate my account;
 - changing any fees payable to my nominated financial adviser;
 - signing any form where the law or an external party requires the member's signature on the form (eg. Binding Death Benefit Nomination, Request to Transfer, Direct Debit Request;
 - changing the name on my account;
 - appointing a new financial adviser for my account; and
 - changing my communication preferences (if applicable).
- I agree to release and indemnify Sandhurst, any company in the Bendigo and Adelaide Bank Group and any associated company (including any of their officers, employees or agents) from and against any and all losses, liabilities, actions proceedings, accounts, claims and demands arising from the appointment or exercise of powers by my financial adviser under this authority.
- I understand and acknowledge that, under this authority, I am bound by the actions of my financial adviser in relation to the operation of my account unless their rights to operate have been withdrawn by Sandhurst.
- I understand that Sandhurst may cancel this arrangement or vary these conditions on 14 days notice.
- I understand that this arrangement will continue until I cancel the authority in writing, or until Sandhurst exercises its rights to cancel the arrangement.

I wish to cancel the authority for my financial adviser to operate my account or give any instructions on my behalf.

Member signature

Date

 / /

Contact details:

Sandhurst Trustees Limited

Bendigo SmartOptions

GPO Box 264

Melbourne VIC 3001

Phone: 1800 033 426

Fax: 03 6215 5800

Email: superannuation@bendigobank.com.au

Website: www.sandhursttrustees.com.au/SmartOptions