# Nominate a Financial Adviser (Adviser Authority)

**To nominate a new or change of Financial Adviser, please complete this form.**

Please use black ink and BLOCK letters.

**Facility Name**

**Facility Number(s)**

## Financial Adviser Details

Title

Adviser First Name

Adviser Surname

Company Name
(if applicable)

AFSL Number

Dealer Group/
Firm Name

Trader Dealer Online Pty Limited

Adviser's existing Facility Access Code (if applicable)

Assistant's existing Facility Access Code (if applicable)

## Mailing Address

(This is not required if the adviser has previously provided these details.)

Address

Suburb/Town

State

Postcode

Country
(if not Australia)

## Contact Details

Adviser Work Phone ( ) 

Adviser Mobile 

Fax Number ( ) 

Adviser Email Address 

Assistant Name 

Assistant Work Phone ( ) 

Assistant Work Phone ( ) 

Assistant Mobile 

Is the adviser applying as the Borrower? Yes

Customer reference used by adviser to identify applicant 

The Lender may share information about the Margin Loan Facility with the Nominated Financial Adviser (including information about Margin Calls). **To make the Nominated Financial Adviser an Authorised Person please initial below.** Alternatively, you can restrict the Nominated Financial Adviser's access to your Margin Loan Facility by ticking the box below.

The Nominated Financial Adviser is an Authorised Person.

Borrower(s) to initial.

The Nominated Financial Adviser is not an Authorised Person and is not authorised to view information about my/ our Margin Loan Facility.

## Acknowledgements

Refer to the Application Form and Clause 50 of the terms and conditions for information about Authorised Persons.

Please sign below to provide consent for your details to be changed. All borrowers must sign for their Adviser to be changed.

| | Borrower 1 / Director 1 / Sole Director | Borrower 2 / Director 2 / Secretary |
|---|---|---|
| **Authorised Signature(s)** | | |
| **Please Print Name(s)** | | |
| | Date / / | Date / / |

**Please complete and return to:**

L3 10/09

Leveraged Equities
GPO Box 5388, SYDNEY NSW 2001

Fax: 02 8282 8383

**If you require any assistance, please contact our Client Service Team on 1300 307 807 or email info@leveraged.com.au**