

### 1. Service Selection and Account Details

Which service/s are you nominating a new adviser for or removing an existing adviser from?

All applicable services relating to username Username

i This is your client login ID for the AUSIEX website. If unknown, call us on **1800 252 351** to obtain.

### Important Information

AUSIEX and the CBA Group will continue to work closely with each other leading up to and after the sale to support each other's systems during a period of transition and separation, including access to AUSIEX and CBA Group information, to perform their respective roles relating to your products and to continue to offer you a seamless customer experience.

AUSIEX Share Trading including linked Exchange Traded Options (ETOs) – *if applicable*

Account name	Trading account number
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

CommSec Adviser Services Accelerator Cash Account (ACA)

Account name	BSB	Account number
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

CommSec Adviser Services Investment Lending and/or CALIA+

Account name	Loan number
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

### 2. New Adviser Details

Before you appoint a new servicing adviser, the adviser must be registered with AUSIEX and, where applicable CommSec Adviser Services. To register, your adviser should contact us on the details provided at the end of this form.

Adviser number, adviser code or username	Dealer Group name
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Adviser name	Email
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Work number	Mobile number	Date of appointment – DD / MM / YYYY
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/>

**Please note:**

The following account access will be provided to your new adviser:

AUSIEX	CommSec Adviser Services
Share Trading – Full Trading Rights	CommBank Accelerator Cash Account – View Only
Exchange Traded Options – Full Trading Rights	CommSec Adviser Services Investment Lending – Full authority to act
	CALIA+ – Full authority to act

No changes will be made to any existing periodic payment established on Accelerator Cash Accounts. Please call CommSec Adviser Services to confirm periodic payments currently in place. If changes are required, complete the CommSec Adviser Services 'Periodic Payment Authority Form' available from the CommSec Adviser Services website.

No changes will be made to any nominated accounts linked to your Accelerator Cash Accounts. Please call CommSec Adviser Services to check which/how many nominated accounts are currently in place. If changes are required, complete the 'Nominated Account Maintenance Form' available from the CommSec Adviser Services website.

**3. Client Declaration and Signature/s**

All account holders must sign this declaration.

1. I/We declare that all details provided in this form are true and correct. I/We undertake to inform you of any changes to the information supplied, as and when they occur.
2. I/We consent to my/our details being changed as indicated in this form.
3. I/We authorise you to provide access to my/our account/s to my new adviser.
4. I/We acknowledge that the new adviser will have all authority on my/our account/s as described in the relevant disclosure document.
5. Where I hold a financial product with CAS, I/we authorise AUSIEX to share my/our personal information to CAS for the purpose of giving effect to the instructions contained in this form.

**CommSec Adviser Services Clients only**

1. (For Investment Loan or CALIA+ facility): I/We authorise you to notify the fund managers of any managed investments I/we have lodged as security, of this adviser appointment.
2. (For Accelerator Cash Account only): I/We confirm the existing periodic payment schedule and nominated accounts linked to my/our ACA are to remain as is, and understand I/we need to complete the relevant form for any changes.

**Account Holder/Director/Trustee 1**

Full name  Date – DD / MM / YYYY  /  /

Signature – *Must be signed pen to paper*

**Account Holder/Director/Secretary/Trustee 2**

Full name  Date – DD / MM / YYYY  /  /

Signature – *Must be signed pen to paper*

**i** If there are more than 2 authorised signatories, please photocopy this page and attach to the form.

Share Trading is a service provided by Australian Investment Exchange Ltd (AUSIEX, the Participant, we, us, our) ABN 71 076 515 930 AFSL 241400. AUSIEX is a market participant of ASX & Chi-X Australia, a clearing participant of ASX Clear Pty Limited and a settlement participant of ASX Settlement Pty Limited.

CommSec Adviser Services (CAS) is brand of Commonwealth Bank of Australia (CBA or the Bank) ABN 48 123 123 124 and Australian credit licence 234945. The Accelerator Cash Account is a deposit product issued by CBA and administered by its wholly owned but non-guaranteed subsidiary Commonwealth Securities Limited (CommSec) ABN 60 067 254 399 AFSL 238814, a market participant of ASX & Chi-X Australia, a clearing participant of ASX Clear Pty Limited and a settlement participant of ASX Settlement Pty Limited, under the CAS brand. Lending products are provided by CBA. Investment Loans are administered by CommSec.

**How to submit your documents**

**Clients**

Please provide your completed and signed form with relevant supporting documents to your adviser.

**Advisers**

Lodge this form and all supporting documents [ausiex.com.au](http://ausiex.com.au) > Administration > eSubmit

