

**i** This form uses JavaScript for optimal performance. Please ensure you have this enabled if completing electronically.  
Refer to the end of this document for [submission instructions](#).

**Which Company or Trust Details Need to be Updated?**

Company name

**Where do the Changes Need to be Applied?**

<input type="checkbox"/>	Apply to all accounts held with AUSIEX.
<input type="checkbox"/>	<b>OR</b> apply to the following accounts only:
	Account number <span style="float: right;">Your account reference – <i>Account name or type</i></span>
	<input type="text"/>
	<input type="text"/>
<input type="checkbox"/>	<b>ALSO</b> apply address and contact detail updates to personal profile of:

**New Company Details**

**New Registered Business Address – *If applicable***

Street address – *Cannot be a PO Box*

Suburb State Postcode

  

Country – *If not Australia*

**New Principal Place of Business Address – *If applicable***  Same as registered business address

Street address – *Cannot be a PO Box*

Suburb State Postcode

  

Country – *If not Australia*

**New Postal Address – *If applicable***

Same as registered business address

Street address

Suburb State Postcode

  

Country – *If not Australia*

**New CHES Address – *If applicable***  Same as new postal address

Street address

Suburb State Postcode

  

Country – *If not Australia*

**Contact Details**

Email address

Business contact number

**Change of Company Name**

New company name

We will perform an ASIC search to verify the new name using the existing ACN/ABN number

**Change of SMSF / Trust Account Designation**

The words "Trust", "as Trustee for", "Trustee", "ATF", "Testamentary" should not be used in account designation as it will not be accepted by CHESS – 23 character limit including spaces

AC

Where a Trust Deed exists (formal Trust), excluding SMSFs, please attach a certified copy of the Deed of Amendment.

**⚠** If there are any changes to the trustees operating the account you will be required to open a new trading account.

**Declaration and Acknowledgement**

1. I/We declare that the information provided on this form is correct and I understand that it is an offence to provide false or misleading information.
2. I/We request that your records be updated to reflect the changes indicated.
3. I/We acknowledge that the information provided in this application or to my/our adviser is complete and correct. I/We will promptly notify AUSIEX of any changes to the information.
4. I/We acknowledge that AUSIEX may require further information from time to time and I/we agree to promptly provide AUSIEX with whatever additional information is reasonably required by AUSIEX.

**Director / Secretary 1**

Full name

Date – DD / MM / YYYY

 /  / 

Signature – Must be signed pen to paper

**Director / Secretary 2 – If applicable**

Full name

Date – DD / MM / YYYY

 /  / 

Signature – Must be signed pen to paper

**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

