

AFS Licensee change of adviser

A14



right by your side

Use this form if you are an AFS Licensee moving clients between your advisers.

This form only applies to Brighter Super accounts issued and administered by Brighter Super.

AFS Licensee's details

Brighter Super ID	AFS' Licence number		
AFS' Licensee name			
Email²			
Phone	Mobile		
Business address			
Suburb/town	State	Postcode	

¹ Australian Financial Services

² The email address you provide will be used to send notifications when your adviser fee statements are available to download via our Secure File Transfer portal.

New adviser's details Brighter Super respects your privacy. All personal information collected is protected in line with Brighter Super's Privacy policy.

Brighter Super Adviser ID	ASIC³ authorised representative number		
Adviser's name			
Practice name			
Phone	Mobile		
Email			
Company address			
Suburb/town	State	Postcode	

³ Australian Securities & Investments Commission

1 Revoke existing authorisation for an adviser

Complete this section to revoke your authorisation for an adviser under your AFS Licence.

I/we want to remove the adviser nominated below and revoke their authorisation under our AFS Licence.

Adviser details

ASIC authorised representative number _____

Adviser's full name: _____

Brighter Super ID: _____

2 Members transferring to the new adviser

List the Brighter Super accounts to be transferred to the new adviser or attach on a separate piece of paper.

Please note:

If you provide the details on a separate piece of paper you (and any other signatories to this form) must sign and date each page, and include the section reference number from the form.

The transfer of rights to a new adviser does not require a new written consent from the client. However, clients should be notified of the change of adviser in a clear, concise and effective manner that reminds them that they can cease their fixed-term or ongoing fee arrangement at any time. Please include a copy of the notifications when submitting this form.

Member details

Member name: _____

Account number(s): _____

Member name: _____

Account number(s): _____

Member name: _____

Account number(s): _____

Member name: _____

Account number(s): _____

Member name: _____

Account number(s): _____

Member name: _____

Account number(s): _____

Member name: _____

Account number(s): _____

Member name: _____

Account number(s): _____

3 Employer plans transferring to the new adviser

List the Brighter Super employer plans to be moved to the new adviser and provide written evidence of each employer's consent. The new adviser will then be recorded as a nominated adviser for employee members in the plan.

Employer plan details

Employer's name: _____

Employer number: _____

Moving to new AFS Licensee? Yes No

Employer's name: _____

Employer number: _____

Moving to new AFS Licensee? Yes No

Employer's name: _____

Employer number: _____

Moving to new AFS Licensee? Yes No

4 AFS Licensee declaration

On behalf of the AFS Licensee, I/we declare that,

- The information on this form is true and correct, and reflects the instructions of the AFS Licensee.
- The AFS Licensee is registered with Brighter Super and the new adviser is its authorised representative and is registered with Brighter Super as its authorised representative.
- The clients nominated in sections 2 and 3 have appointed the new adviser as their adviser for their Brighter Super account(s)/employer plan.
- I/ we understand that Brighter Super requires a copy of the client notification outlining the change in adviser from both the existing and new adviser.
- I/we understand that if Brighter Super accepts this request, it will add the new adviser as the adviser for the clients nominated on this form who have provided their consent. However Brighter Super will not provide this adviser with any additional authorities the old adviser may have held in respect of any of these client(s).
- I/we understand all authorisations provided by these clients for the old adviser will be revoked when this request is accepted by Brighter Super.
- I/we understand that any consent provided by any member nominated in section 2 for the deduction of any advice fee(s) from their Brighter Super account paid to the old adviser will be revoked on or before the date Brighter Super accepts this application.
- I/ we understand that to accept advice fee deductions under the existing arrangement, the consent and arrangements must remain the same in all other aspects except for the change in adviser.
- I/we are authorised by AFS Licensee to make these declarations and this application to Brighter Super.

Representative 1	Position
Signature	Date signed / /
Representative 2	Position
Signature	Date signed / /

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