

Adviser Authority Form



Complete this form to allow your financial adviser to request information in relation to your Slate Super account on your behalf.

You can also use this form to arrange an adviser service fee payment to your financial adviser, with the fee paid to your financial adviser out of your Slate Super account balance.

You can find detailed information about Slate Super in our Product Disclosure Statement (PDS), Additional Information Booklet, Insurance Guide, Financial Services Guide and Privacy Policy, all of which can be obtained from www.slatesuper.com.au or on request by phoning **02 8074 1772**.

This form may be posted to Slate Super **PO Box R1979, Royal Exchange NSW 1225** or scanned and emailed to info@slatesuper.com.au.

1. Personal Details

Given Name(s)	Surname		
Member Number	Date of Birth		
	DD	MM	YYYY
Mobile Phone Number	Email Address*		
Residential Address	City	State	Postcode

* By providing your email address, you consent and authorise us to send you communications or information, including information required by law, via email or similar technologies. Your details will never be passed onto a third party other than in accordance with our Privacy Policy. You can unsubscribe from our non-essential emails at any point or elect to receive communications by post by contacting Slate Super on **02 8074 1772** or via email at info@slatesuper.com.au or in writing at **PO Box R1979, Royal Exchange NSW 1225**.

2. Dealer Group and Financial Adviser Details

A. Dealer Group details:

Dealer Group Name	Registered Office (physical address)		
ABN	City	State	Postcode
AFS Licence			

B. Financial Adviser details:

Adviser Name	Phone Number		
Advisor Authorised Representative No.	Email Address		
Registered Office (physical address)	City	State	Postcode

3. Information Authority

I consent to the Financial Adviser named on this form being able to request information in relation to my Slate Super account on my behalf.

Once we receive the completed form, we will provide your financial adviser with information (oral, written or electronic) in relation to your Slate Super account as if the request was made by you. At anytime if you do not wish your financial adviser to be able to access information in relation to your Slate Super account, you should notify us immediately on **02 8074 1772** or via email at info@slatesuper.com.au or in writing at **PO Box R1979, Royal Exchange NSW 1225**.

Your financial adviser will not be authorised to change your personal contact details, give any instructions or carry out any transactions on your behalf, including switching investment options, making contributions, requesting a rollover or making lump sum withdrawals. Personal information such as your tax file number and bank account details will not be released to your financial adviser under any circumstances.

4. Adviser Service Fee

Complete this section **only** if you have agreed to pay your financial adviser an Advisor Service Fee. You may authorise your financial adviser to request information in relation to your Slate Super account on your behalf without agreeing to the payment of an Adviser Service Fee.

An Adviser Service Fee is a fee agreed to between you and your financial adviser, made as payment for financial advice that you have received. The fee is paid from your superannuation account balance. This fee can be removed at any time in the future by either yourself or your financial adviser. Adviser Service Fees are calculated and paid monthly.

Please select the relevant Adviser Service Fee payment option and insert the relevant \$ or % amount (noting all fees quoted are exclusive of GST):

- Single asset based fee of as a one-off payment.
- Ongoing asset based fee of % per annum.
- Ongoing asset based fee of per month.

Dealer Group payment details:*

Email for Payment Advice	Account Name
Name of Financial Institution	BSB
Account Number	

* This information only needs to be included if an Advisor Service Fee has been agreed. We can only make payments into an Australian bank, credit union or building society account.

5. Declaration and Signature

By completing and signing this form, I declare that:

- All the details I have provided are true and correct.
- I have read and understood the Slate Super PDS and all related documents applicable to this Form.
- I have read the Privacy Statement (below) and understand how Slate Super will use my personal information.
- The adviser I have indicated on this form is able to request information about my Slate Super account on my behalf, and this authorisation will remain effective until such time as I revoke or change my authority.
- The advisor I have indicated on this form is not authorised to change my personal contact details, give any instructions or carry out any transactions on my behalf, including switching investment options, making contributions, requesting a rollover or making lump sum withdrawals. Personal information such as my tax file number and bank account details will not be released to the nominated person under any circumstances.
- I agree to release, discharge and indemnify Slate Super and the Trustee from and against all actions, claims, demands, expenses and liabilities (however they arise) suffered by myself or suffered by or brought against Slate Super or the Trustee, in respect of the information given by Slate Super to my adviser.
- I agree and understand that I have directly engaged the Dealer Group and/or the Adviser to provide Financial Services. I agree that neither Slate Super or the Trustee is a party to that arrangement and is not liable for any loss which results from that arrangement.
- If I have authorised a Financial Adviser to receive payment by way of a Adviser Service Fees, this fee will be deducted from my SlateSuper account unless and until I provide notice to Slate Super for the Adviser Service Fee to cease.

Signature

Date

DD	MM	YYYY
----	----	------

Print name

PRIVACY STATEMENT: By signing this form you consent to Slate Super collecting and using your personal information in order to establish and administer your super account, improve our products and services, keep you informed and comply with the relevant legislation. Your personal information is generally collected from you but sometimes it may be collected from third parties like your employer or another Australian super fund with whom you have an account. Your personal information may be disclosed to other parties, including the Trustee, the Fund Promoter, the Fund’s Administrator, the Fund’s Insurer and professional advisers, government bodies and the trustee of any other fund to which you transfer, in order to administer your account. To access your personal information or for a copy of our Privacy Policy, visit www.slatesuper.com.au, phone **02 8074 1772** or email us at info@slatesuper.com.au.