

How you can transact with us

There's a range of ways you can get in touch with us.

WHAT WOULD YOU LIKE TO DO?	FORM	ONLINE	PHONE	LETTER	FAX	EMAIL
Transact						
1 Make an initial application	✓ Application form	✗	✗	✗	✗	✗
2 Make an additional investment	✓ Additional investment application form	✓	✗	✓	✗	✗
3 Switch funds	✓ Switch request form	✓	✓*	✓	✓	✗
4 Make a redemption (partial or full)	✓ Withdrawal request form	✓	✓*	✓	✓ (new bank account details can't be provided by fax)	✗
5 Transfer into or out of a fund	✓ Australian Standard Transfer form	✗	✗	✗	✗	✗
Change details						
6 Change your name	✓ Account amendment form (with additional certified documentation)	✗	✗	✓	✗	✗
7 Change your address/contact details	✓ Account amendment form	✓	✓	✓	✓	✗
8 Change your bank account details	✓ Account amendment form	✓	✗	✓	✗	✗

*Subject to conditions.

WHAT WOULD YOU LIKE TO DO?	FORM	ONLINE	PHONE	LETTER	FAX	EMAIL
9 Change your Regular Savings Plan	✓ Direct Debit and Regular Savings Plan request form	✓	✓ (new bank account details can't be provided by phone)	✓	✓ (new bank account details can't be provided by fax)	✗
10 Change your Regular Withdrawal Plan	✓ Regular Withdrawal Plan request form	✓	✓ (new bank account details can't be provided by phone)	✓	✓ (new bank account details can't be provided by fax)	✗
11 Amend distribution options	✓ Account amendment form	✓	✓ (new bank account details can't be provided by phone)	✓	✗	✓ (new bank account details can't be provided by email)
12 Establish bank account details for a direct debit	✓ Direct Debit and Regular Savings Plan request form	✓	✗	✗	✗	✗
13 Make a change of signatories	✗	✗	✗	✓	✗	✗
14 Provide Tax File Number/ABN details	✓ Account amendment form	✓	✓	✓	✓	✗
15 Add or change your adviser	✓ Bulk investor transfer form or Single investor transfer form	✗	✓	✓	✓	✓
16 Remove an adviser	✗	✗	✗	✓	✓	✓
17 Change your adviser remuneration/ongoing commission	✓ Account amendment form	✓	✗	✓	✓	✗

Contact Centre: 1800 819 935

Adviser Services: 1300 361 864

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