

For name changes, an original certified copy of the original documents will need to be provided. Please refer to the 'Completing Proof of Identity' document on www.ioof.com.au/forms for a list of persons authorised to certify copies of original documents.

Signature of client/ Power of Attorney or Guardian	<input type="text"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
Previous signature (where name has changed)	<input type="text"/>	Date	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>

Step 3: Change of entity name

New entity name	<input type="text"/>
Previous entity name	<input type="text"/>

Please provide supporting documentation as proof of change of name. Please only complete this section if the name of an entity has changed and not to update an entity associated with your account.

Step 4: Change of account name for joint accounts

New account name	<input type="text"/>
Previous account name	<input type="text"/>

Please only use this section to update the name of the joint account. You cannot use this form to update the investors linked to the account.

Step 5: Change of address

For a fast and convenient way to change your address, simply log into IOOF Online and enter your user ID and password.

If you have not registered for IOOF Online, please click on the 'Register for access' link and follow the instructions to gain access.

If you are unable to change your address online, please complete the details below.

Please select the address(es) that you require to update:

Residential address Mailing address Registered address Principal place of business

Address	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>
Country (if not Australia)	<input type="text"/>		
Phone (home)	<input type="text"/>	Phone (work)	<input type="text"/>
Mobile	<input type="text"/>		
Email	<input type="text"/>		

If you are residing overseas you must complete and submit:

- an Overseas Investor form (www.ioof.com.au/forms);
- original certified copies of your identification documents; and
- step 7 of this form.

Step 6: Change of additional address

Please provide updated address if different from the address in Step 5.

Please select the address(es) that you require to update:

Residential address Mailing address Registered address Principal place of business

Address	<input type="text"/>		
Suburb	<input type="text"/>	State	<input type="text"/>
		Postcode	<input type="text"/>
Phone (home)	<input type="text"/>	Phone (work)	<input type="text"/>
Country (if not Australia)	<input type="text"/>		

Step 7: Change and confirmation of taxation residency details

Please answer **both** tax residency questions as you can be a tax resident of more than one country.

Is the Individual/Company/Trust/Partnership/Association a tax resident of Australia? Yes No

Is the Individual/Company/Trust/Partnership/Association a tax resident of any other Country? Yes No

If you are a tax resident of any other country please complete the details below.

Foreign Residents only – Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS)

Under FATCA and CRS laws, we are required to ask all investors to provide additional information about their tax residency. Tax residency rules differ by country. Whether an individual is a tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work.

For all countries where you are a tax resident please provide a TIN (Tax Identification Number) which is the number assigned by each country for the purposes of administering tax laws such as a Social Security Number in the US. If a TIN cannot be provided, please list one of the three reasons specified (A, B or C) for not providing a TIN.

Country	TIN	If no TIN, please list Reason A, B or C
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

If there are more countries, provide details on a separate sheet and tick this box

Reasons for not providing a TIN:

Reason A – The country of tax residency does not issue TINs to tax residents, OR

Reason B – You have not been issued with a TIN – **please provide details for this reason**, OR

Reason C – The country of tax residency does not require the TIN to be disclosed.

Reason you have not been issued with a TIN (if applicable)

Step 8: Change of Financial Institution Details

Financial institution	<input type="text"/>	
Account name	<input type="text"/>	
BSB	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	Account number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Please note: This account will become the nominated institution for any regular withdrawal plan (including the Automatic Income Distribution Facility) and adhoc withdrawals. The account must be in the same name or jointly in the name of the IOOF Essential Investment account.

Step 9: Declaration and signature(s)

Please note: The Service Operator collects the information in this form for the purpose of updating the information it holds about you. Any personal information provided in this form will be handled in accordance with the privacy policy at www.ioof.com.au/privacy. If you do not provide all of the requested information, we may not be able to action your request.

- I/We will promptly notify the Service Operator if any of these details change and on request with any further information which is necessary or desirable for the Service Operator to comply with any obligations it may have in connection with FATCA/CRS.
- I/We consent to the collection and use of the above information by the Service Operator for the purposes specified.
- I/We authorise any changes set out in this form to be applied to or recorded against my/our account.
- I/We declare that the details given in this form are true and correct.

Please note: If this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this form unless we have already received it). You generally cannot sign under Power of Attorney if acting on behalf of entity.

Signature

Signatory 1 Date / /

Full name

Role (such as Investor/
Director/Trustee)

Additional signatures (if required)

Signatory 2 Date / /

Role (such as Investor/
Director/Trustee as applicable)

Full name

Signatory 3 Date / /

Role (such as Investor/
Director/Trustee as applicable)

Full name

Signatory 4 Date / /

Role (such as Investor/
Director/Trustee as applicable)

Full name

Signatory 5 Date / /

Role (such as Investor/
Director/Trustee as applicable)

Full name

Signatory 6 Date / /

Role (such as Investor/
Director/Trustee as applicable)

Full name

Common seal
(of company) if required

Please forward all correspondence and enquiries to

- Post:** IOOF Essential
GPO Box 264, Melbourne VIC 3001
- Email:** clientfirst@ioof.com.au
- Telephone:** 1800 913 118
- Web:** www.ioof.com.au