AET My Portfolio
Adviser access request form

Australian Executor Trustees

Do not complete this form if you are accessing WAF via a promoter.

Please complete this form if you require access to AET My Portfolio. If more than one associate requires access, a separate form must be completed for each associate.

Section 1: Financial adviser details

Dealer name

Dealer group stamp

Name of financial adviser

Telephone

Street address

Suburb

State

Postcode

Mailing address (if the same as above write 'as above')

Suburb

State

Postcode

Email address (your login details and password will be sent separately to this address)

Financial adviser declaration and signature

I confirm I have read, and agree to be bound by, Australian Executor Trustees' terms and conditions for AET My Portfolio as amended from time-to-time.

Signature of financial adviser

Date / /

Section 2: Associate details

If an associate requires access, please ensure the adviser completes sections 1 & 2.

Name of associate

Email address (your login details and password will be sent separately to this address)

Associate declaration and signature

I confirm I have read, and agree to be bound by, Australian Executor Trustees' terms and conditions for AET My Portfolio as amended from time-to-time.

Signature of associate

Date / /

Authorisation from financial adviser

Date / /

Financial adviser to complete

☐ I authorise the above request for access to AET My Portfolio and confirm that the above individual is an authorised agent of the dealer group and branch. I will ensure AET is informed immediately when the above associate ceases employment or is otherwise no longer authorised to enquire or transact on our behalf.

Please return to us by:

Fax 1800 781 166
Email forms@aetlimited.com.au
or post Australian Executor Trustees Limited
GPO Box 546
Adelaide SA 5001

Office use only

User ID

☐ Details verified
☐ AET My Portfolio has been updated
☐ AET systems have been updated
☐ CSA has been notified

Intermediary branch code

Service administrator name

Australian Executor Trustees Limited (AET) (ABN 84 007 869 794) AFSL 240023 and Equity Trustees Superannuation Limited (ETSL) ABN 50 055 641 757 AFSL 229757, RSE L0001458 are part of the EQT Holdings Limited (ABN 22 607 797 615) group of companies, listed on the Australian Securities Exchange (ASX:EQT).

AET and ETSL seeks to maintain the accuracy of the personal information it holds about you to assist us in providing our services to you. This information is handled in accordance with our Privacy Statement in order to protect your personal information. You can view our Privacy Statement on our website: https://www.eqt.com.au/global/privacystatement

PLA-3244 (52384) 0120