

Change of Adviser Form

(Use a separate form for each Fund Manager)

1. Client Details

First Name	
Surname	

Or

Company / Entity Name	
Directors / Trustee Name	

2. Contact Details

Street Address	
Suburb / City	
Contact Phone Number	
Email Address	

3. Details of Your Existing Investments

Fund Manager	
Investment Name	
Account / Reference No	

I/We have appointed Open Financial Services Pty Ltd (AFS License No: 232977) as our adviser on the above account. I/We request that the above fund manager reflect this change immediately. I/We understand that Open Financial Services Pty Ltd will receive trailing commissions based on the amount I/we have invested. I/We also understand that Open Financial Services Pty Ltd will apply a 100% rebate of entry fees on any additional and/or regular contributions.

Signature of Client / Director

Signature of Client / Director

Date: _____

Date: _____

Please return the form to:

Open Financial Services Pty Ltd
PO Box 58
CARLTON SOUTH VIC 3053

Or fax the completed form to:

(03) 9663 7593