ANZ INVESTMENT LENDING
CHANGE OF BROKER/FINANCIAL ADVISER

Please fill in this form if you have changed the broker/adviser linked to your ANZ Share Investment Loan.

By providing this information, you are granting your adviser with view-only access to your account via My Portfolio.
Please note: if you would like your adviser to have instruct or transact access to your account, you will need to fill in the Authorised Persons Form.

1. CLIENT DETAILS

Account name

Client account number

2. BROKER/FINANCIAL ADVISER DETAILS

Name of broker/adviser (name of individual)

Name of adviser firm

Name of broker firm

PID

Broker/adviser's email address

Broker/adviser's telephone number

Your broker/adviser will be able to view your account details via My Portfolio. If you do not wish to provide access please tick here. ☐

3. AUTHORISATION

All Individual Trustees OR all Trustees for Minor OR two Directors OR one Director and one Company Secretary must sign this application.

Client/Director/Trustee 1

Name

Signature

Date D D M M 2 0 Y Y

Client/Director/Trustee 2

Name

Signature

Date D D M M 2 0 Y Y

Client/Director/Trustee 3

Name

Signature

Date D D M M 2 0 Y Y

Director/Trustee 4

Name

Signature

Date D D M M 2 0 Y Y

Note to Client

Access will only be granted to the broker/financial adviser detailed above and/or their designated support staff.

Complete and return this form to:

Mail: ANZ Investment Lending
Reply Paid 4338, Melbourne VIC 8060
(no stamp required)

Email: investmentlending@anz.com

Contact us:

Phone: 1800 639 330
8am to 6pm
(Sydney/Melbourne time)
ASX trading days