

FirstNet Investor and FirstLink change of details form

Use this form to:

- Request a new PIN
- Change your access level
- Add a nominated bank, building society or credit union account for online transactions
- Remove a nominated bank, building society or credit union account for online transactions

Please use BLOCK letters, tick the appropriate boxes and sign the bottom of this form. If you have a joint account and you both require access, please complete a form each.

A. Your details

Title	Surname (or company name if applicable)	Given names
<input type="text"/>	<input type="text"/>	<input type="text"/>
Address	Postcode	Daytime phone number
<input type="text"/>	<input type="text"/>	<input type="text"/>
Colonial First State account number (s)	Date of birth	Email
<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>

B. What change do you wish to make here?

I would like to:

- Request a new PIN
- Change my level of access to FirstNet Investor (internet) transaction access and FirstLink (phone) enquiry access (please complete the direct debit and credit authority in Section C below)
- Change my level of access to FirstNet Investor (internet) and FirstLink (phone) enquiry access only
- Add a bank, building society or credit union account for online transactions (please complete the direct debit and credit authority in Section C below)
- Remove a bank, building society or credit union account for online transactions (please complete the direct debit and credit authority in Section C below)

C. Your direct debit and credit authority

To conduct transactions online, you must nominate at least one (and up to four) bank, building society or credit union accounts (this may include a Colonial First State Cash Management Trust account).

This section allows you to add or remove two (bank or building society) accounts. If you wish to add or remove more, please photocopy this page, fill in the details and return it with this change of details form.

This application form can only be used to nominate an account which is held in your name(s). If you wish to make investments from a nominated account in a different name or names to this investment, it will be necessary for you to use a separate direct debit authority form. There is a separate direct debit form in your investor guide or visit the website at www.colonialfirststate.com.au

I would like to:

- Add this account to my nominated account list Remove this account from my nominated account list

Branch number (BSB)	Account number	Bank, building society or credit union name and branch name
<input type="text"/> <input type="text"/> <input type="text"/> -- <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>

Account held in the name of

I would like to:

- Add this account to my nominated account list Remove this account from my nominated account list

Branch number (BSB)	Account number	Bank, building society or credit union name and branch name
<input type="text"/> <input type="text"/> <input type="text"/> -- <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>

Account held in the name of

D. Declaration and acknowledgement

I declare that I am an authorised signatory on the original application form(s) and understand that only an authorised signatory may access information on my investments. I acknowledge that use of FirstNet and/or FirstLink is subject to the terms and conditions of use detailed overleaf and I agree to these terms. I also acknowledge that if signing as a joint signatory, each joint account holder will be held to have authorised the signatory to sign this statement on behalf of both parties.

Direct debit request authorisation

- I/We authorise Colonial First State Investment Managers (Australia) Limited (011802) to arrange for funds to be debited from my/our account at the financial institution identified in Section C above and as prescribed through the Bulk Electronic Clearing System (BECS);
- I/We have read the 'Direct Debit Customer Service Agreement' provided with this form and agree with its terms and conditions;
- I/We request this arrangement to remain in force in accordance with the details set out in Section C and in compliance with the 'Direct Debit Customer Service Agreement'.

Signature of Account holders

<input type="text"/>	Date
<input type="text"/>	<input type="text"/>

Please send your completed and signed form to:
Reply Paid 534
Colonial First State
GPO Box 3956
SYDNEY NSW 1007

FirstNet and FirstLink Terms and Conditions of Use

By forwarding us a completed registration form and accessing FirstNet, you agree:

- to use FirstNet only in accordance with these Terms and Conditions ('the Agreement') and your other legal obligations
- to use FirstNet only to access your own account information
- to keep your Investor Information confidential and not to disclose it to anyone. 'Investor Information' includes your Online Investor Number (OIN), Personal Identification Number (PIN) and account numbers
- that we may debit from your account any Government fees or charges incurred by us in connection with your use of FirstNet
- where there are joint signatories on an account and one of you registers for FirstNet with transaction access, you will both be taken to consent to a transaction each time one of you transacts on your account(s) through FirstNet
- that we will only act on completed communications. In the case of an online transaction, the display of a transaction reference number on-screen is evidence that your transaction has been received. We will not be liable for any loss or delay resulting from the non-receipt of any transmission.
- to use information that you obtain by using FirstNet and your Investor Information, only for lawful purposes
- that any instructions for using FirstNet posted on this website, from time to time, form part of the Agreement
- that we may amend the Agreement at any time by posting the amended version on this website
- that you must tell us if your contact and account details change
- that we may disclose account information to and permit transactions by, any user of FirstNet using valid Investor Information, whether such use was authorised by you or not
- that beneficiaries and nominees of investment accounts will not be given access to account details via FirstNet
- that underlying clients of nominee accounts and mortgaged accounts are permitted 'enquiry access'
- that we may terminate the Agreement or prevent you from accessing FirstNet at any time
- that you may terminate the Agreement by providing us with 7 days notice in writing
- that you must notify us immediately if you become aware that your Investor Information or FirstNet have been accessed by an unauthorised person
- that we will take all reasonable care to ensure that the information which you access by using FirstNet and the Investor Information is accurate and up-to-date
- that we make no warranty that the use or operation of FirstNet will be uninterrupted or error-free or that FirstNet is suitable for any particular purpose or has any performance, functionality or security features except as we are required to provide by law
- that we are not liable for, and you indemnify us in respect of all claims arising from use of FirstNet, your Investor Information or account information otherwise than in accordance with the Agreement
- to the extent permitted by law that our liability is limited to resupplying FirstNet services
- 'transaction access' means the ability to review, modify and update information relating to your contact details and accounts online. For accounts with this facility, you will be able to apply, redeem and switch units between funds and to set up automatic functions (such as Regular Investment Plan (RIP))
- 'enquiry access' means the ability to view (but not alter) your account information online.

Direct Debit Customer Service Agreement

Our commitment to you

- We will send you regular transaction statements in addition to the initial confirmation of your drawings.
- Where the due date for a drawing falls on a non-business day, we will draw the amount on the next business day.
- We will provide you with 14 days written notice of any proposed changes to your drawing arrangement.
- We may charge you a dishonour fee for drawings that are returned unpaid by your Financial Institution, and may terminate your Direct Debit arrangement if drawings are returned unpaid 3 times in any 12 month period. Where drawings are returned unpaid we will arrange with you for an alternate payment method.
- We will keep all information provided by you and details of your nominated account at the Financial Institution, private and confidential.
- We will investigate and deal promptly with any queries, claims or complaints regarding debits, providing a response within 20 business days.

Your commitment to us

- It is your responsibility to check with your Financial Institution prior to completing the Direct Debit Request, that direct debiting is available on that account.
- It is your responsibility to ensure that the authorisation on the Direct Debit Request is identical to the account signing instruction held by the Financial institution of the nominated account.
- It is your responsibility to ensure at all times, that sufficient funds are available in the nominated account to meet a drawing on the due date for payment.
- It is your responsibility to advise us if the account nominated by you to receive the drawings is altered, transferred or closed.
- It is your responsibility to arrange with us a suitable alternate payment method if the drawing arrangements are stopped either by you or the nominated Financial Institution.
- It is your responsibility to meet any charges resulting from the use of the Direct Debit System. This may include fees charged to us as a result of drawings returned unpaid.

Your rights

- You may request to defer or alter the agreed drawing schedule, by giving written notice to us. Such notice should be received by us at least 5 business days prior to the due date for the next drawing.
- You may cancel the Direct Debit arrangement at any time by giving written notice to us. Such notice should be received by us at least 5 business days prior to the due date for the next drawing. Your nominated Financial Institution is unable to cancel your Direct Debit arrangement with us.
- All transaction disputes, queries, and claims should be raised directly with us. We will provide a verbal or written response within 20 business days from the date of the notice. If the claim/dispute is successful, we will reimburse you by way of cheque or electronic credit to your nominated account.

Please visit our website at www.colonialfirststate.com.au, or phone our Investor Service Centre on 13 13 36 with any enquiries.



Investment Superannuation Retirement