



# Change of details form

## 1 Investment details

Investor number

Name of Fund/s

Adviser name (if applicable)

## 2 Investor's personal details

Investor name currently registered

Address

State

Postcode

## 3 New address details

New address

State

Postcode

Contact details

Work

Home

Mobile

Email

## 4 New name

New surname

Given names

New title

Certified copy of marriage certificate attached Yes  No

Certified copy of deed poll attached Yes  No

## 5 Change of nominated account

For distribution and withdrawals.

Name of financial institution

Branch name

Branch address

State

Postcode

Account name

Bank/State/Branch (BSB number)

□□□□ - □□□□

Account number

□□□□□□□□□□

Please check with your bank or financial institution that your account details are correct as Zurich is unable to check this information. Incorrect information can result in payment to the wrong account. Zurich is not responsible for funds paid to the wrong account on your instruction.

## 6 Distributions

I/We wish to change the method of receiving my/our distributions to:

Name of Fund/s applicable to this request

Payment to nominated back account (complete section 5)

Reinvest as additional units

## 7 Communication preferences

Zurich is required by law to provide a copy of the financial statements to each investor unless you indicate otherwise. For investors who do not wish to receive a paper copy of the financial statements, an electronic copy is available on our website [www.zurich.com.au](http://www.zurich.com.au).

Do you wish to receive paper copies of the Funds' annual financial statements? Yes  No

Please change correspondence preference to:- Mail  Email

## 8 Signatures

Please note that all joint investors must sign this form unless indicated otherwise in your initial application. Applications by a trustee(s) must be signed by each trustee. In the case of company signatories two directors, or a director and a company secretary must sign unless the sole director is also sole company secretary.

### Investor 1

Name

Signature	Date
X	/ /

### Investor 2

Name

Signature	Date
X	/ /

## 9 Your privacy

Zurich is bound by the Privacy Act 1988 (Cth). In completing the forms or questions herein you will be providing us with your personal and, perhaps, sensitive information. The collection and management of this information is governed by the Privacy Act 1988. For a more detailed explanation of Zurich's Privacy Policy please visit our website at [www.zurich.com.au](http://www.zurich.com.au) or contact the Zurich Privacy Officer on 132 687 or email us at [privacy.officer@zurich.com.au](mailto:privacy.officer@zurich.com.au).

### Any questions?

Please contact our Client Service Centre on **131 551**.

Fax: 02 92870324

Email: [client.service@zurich.com.au](mailto:client.service@zurich.com.au)

**Please send your completed form to:**

**Zurich Investment Management Ltd**  
**PO Box 5038**  
**Parramatta NSW 2124**