

IconiQ Investment Change of Financial Adviser form

Change of Financial Adviser

You can use this form to nominate a new Financial Adviser (or where your Financial Adviser has moved licensees) to manage your Portfolio(s) in IconiQ Investment. If you have more than one Portfolio, this form applies to all of your Portfolios.

Section 1: Personal details

Portfolio number(s)

Full name

Date of birth

D	D	M	M	Y	Y	Y	Y
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Section 2: New Financial Adviser details

Please note: You can only nominate an adviser that is a representative of a licensee that is authorised to provide financial services in relation to IconiQ Investment.

Adviser name

Email address

Phone number

AFS Licensee name

AFS Licensee number

Section 3: Client declaration

By submitting this form, I represent to the Operator of IconiQ Investment that all the details in this form are true and correct and I declare that:

1. I have received, read and understood and agree to be bound by the terms and conditions set out in the relevant disclosure documents that are current as at the date I sign this form for the product or products to which this appointment relates; and
2. I authorise IconiQ Investment to change my Financial Adviser as detailed in Section 2; and
3. I authorise IconiQ Investment to disclose to my Financial Adviser information regarding my investments held through the Portfolio(s); and
4. My existing Fee arrangement with the existing Financial Adviser will be cancelled, the Financial Adviser will no longer be remunerated and will no longer have access to my information; and
5. My Fee arrangement with the new Financial Adviser will be set up online separately; and
6. I will advise IconiQ Investment if I change or cease to have my Financial Adviser or if there are any changes to my Financial Adviser arrangements.

This form must be signed by all signatories to the account (as applicable). For joint accounts, all account holders must sign.

Account signatory 1

Full name

Position/title

Individual Director Company secretary

Other

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Account signatory 2 (if applicable)

Full name

Position/title

Individual Director Company secretary Other

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Companies may sign in accordance with their constitution and the law. If you require more than two (2) signatories, please copy this page.

How to return this form

Provide to your Adviser

Provide this completed form to your Financial Adviser to upload on your behalf, to your Document Library via the online portal.

If required, you may post this form to:

GPO Box 1657
Melbourne Vic 3001

Your Privacy

When you provide instructions to your IconiQ Investment ("IconiQ") Portfolio, the Operator will be collecting personal information about you. Information about how the Operator collects, uses and discloses your personal information is set out in the Operator's Privacy Policy, available at www.iconiqwrap.com.au.

IconiQ Investment

GPO Box 1657
Melbourne VIC 3001
Phone: 1300 746 454

www.iconiqwrap.com.au

Issued by:

Ventura Investment Management Ltd
ABN 49 092 375 258

Ventura Investment Management Ltd ("Ventura") ABN 49 092 375 258 is the operator of IconiQ Investment and Responsible Entity for IconiQ SMA and a wholly owned subsidiary of Centrepoint Alliance Limited ABN 72 052 507 507.