

# Change of Member/Client Details

You can use this form to update the details we have for your IconiQ Super Wrap and/or IconiQ Investment.

You can update your name, addresses, phone numbers or email addresses, and your new details will be applied to all Portfolios that you hold.

Please complete Section 1 and all other sections that apply to the details you are updating.

## Section A: Existing Details

Portfolio Number (Account Number eg. IQ1234567)

Family Name

First Given Name

Other Given Names

Date of Birth

D	D	M	M	Y	Y	Y	Y
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Postal Address



Suburb

State

Postcode

Country if Outside of Australia

Daytime Phone Number

# Section B: Update Details

Please complete this section if you wish to change the name we have on file.  
Please refer to Section E below for the required identification documentation.

First Given Name

Other Given Names

Family Name

Date of Birth

D

D

M

M

Y

Y

Y

Y

# Section C: Update Contact Information

Please complete the fields that you would like to update.

## New Residential Address

Residential Address

Suburb

State

Postcode

Country if Outside of Australia

## New Postal Address

Postal Address

Suburb

State

Postcode

Country if Outside of Australia

## New Mobile Number

Please refer to Section E below for the required identification documentation to update your mobile number.

Current Mobile Number

New Mobile Number

## New Work Phone Number

Current Work Phone Number

New Work Phone Number

New Email Address

Current Email Address

New Email Address

Section D: Bank Account Details

Privacy

When you provide instructions by completing this form, personal information about you is being collected. If you hold an IconiQ Investment and/or IconiQ Super Wrap portfolio, information about how the Operator and/or Trustee collects, uses and discloses your personal information is set out in the Operator's Privacy Policy available at [www.iconiqwrap.com.au](http://www.iconiqwrap.com.au) and the Trustee's Privacy Statement at [www.eqt.com.au](http://www.eqt.com.au).

Declaration

I declare that:

- the information provided on this form, and any associated documentation, is true and correct, and I authorisethe changes to be made in relation to my Portfolio/s;
- If the information provided in this form is not correct or verifiable, this form may not be processed, or I may be requested to provide additional information;
- I have read the Trustee's and/or Operator's Privacy Statements and understand how my personal information will be collected and used;
- I understand that my IconiQ Super Wrap and/or IconiQ Investment Profile will be updated to reflect the information provided in this form;
- I will immediately notify the Trustee or Operator if any of my personal details change in the future; and
- the information provided in this form could potentially alter my entitlement eligibility and insurance

Full Name of Member

Signature

Date

D

D

M

M

Y

Y

Y

Y

Section E: Identification Requirements

If you have changed your name or mobile number, there are supporting documents that are required to proceed. Please provide clear and legible, certified copies of these when submitting this Form.

Request	Supporting Document Required
Change of Name	<div>1. Please supply either:<ul style="list-style-type: none"><li>Certified copy of one (1) form of primary identification or,</li><li>Certified copies of two (2) forms of secondary identification; and</li></ul></div> <div>2. Certified Copy of Marriage Certificate, Deed Poll or Change of Name Certificate from the Births, Deaths and Marriages Registration Office.</div>
Change of Mobile Number	<div>Please supply either:<ul style="list-style-type: none"><li>Certified copy of one (1) form of primary identification or,</li><li>Certified copies of two (2) forms of secondary identification</li></ul></div>

### Example of Primary Identification

- ☐ Current Australian driver's licence or foreign equivalent that includes your photo and signature.
- ☐ An Australian passport or foreign equivalent that includes your signature (may be current or expired within 2 years).
- ☐ An identity card issued by a State or Territory Government that includes your photo.

### Example of Secondary Identification

Please provide one (1) certified document from Column A and one (1) certified document from Column B.

Column A	Column B
<input type="checkbox"/> Australian birth certificate	<input type="checkbox"/> A document issued by the Commonwealth or a State or Territory within the preceding 12 months that records the provision of financial benefits to you and which contains your name and residential address.
<input type="checkbox"/> Australian citizenship certificate	<input type="checkbox"/> A document issued by the Australian Taxation Office within the preceding 12 months that records a debt payable by you to the Commonwealth (or by the Commonwealth to you), which contains your name and residential address.  Please block out your TFN before providing this document.
<input type="checkbox"/> Pension card issued by the Department of Human Services	<input type="checkbox"/> A document issued by a local government body or utilities provider within the preceding 3 months which records the provision of services to you or your address (the document must contain both your name and address).

### Who can certify your documentation

Your documentation can be certified by any of the following individuals:

- A person who is licensed or registered to practice in one of the following occupations:
  - Chiropractor
  - Dentist
  - Legal practitioner
  - Medical practitioner
  - Nurse
  - Optometrist
  - Patent attorney
  - Pharmacist
  - Physiotherapist
  - Trade marks attorney
  - Veterinary surgeon
- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Australian Consular Officer or Australian Diplomatic Officer (within the meaning of the Consular Fees Act 1955)
- Bailiff
- Bank officer with 2 or more continuous years of service
- Building society officer with 2 or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with 5 or more years of continuous service
- Employee of the Australian Trade and Investment Commission who is:
  - a. in a country or place outside Australia; and
  - b. authorised under paragraph 3 (d) of the Consular Fees Act 1955; and
  - c. exercising his or her function in that place
- Employee of the Commonwealth who is:
  - a. in a country or place outside Australia; and
  - b. authorised under paragraph 3 (c) of the Consular Fees Act 1955; and
  - c. exercising his or her function in that place
- Fellow of the National Tax Accountants' Association

- Finance company officer with 2 or more years of continuous service
- Holder of a statutory office not specified in another item in this Part
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australian Defence Force who is:
  - a. an officer; or
  - b. a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 2 or more years of continuous service; or
  - c. a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
  - a. the Parliament of the Commonwealth; or
  - b. the Parliament of a State; or
  - c. a Territory legislature; or
  - d. a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- Permanent employee of:
  - a. the Commonwealth or a Commonwealth authority; or
  - b. a State or Territory or a State or Territory authority; or
  - c. a local government authority; with 2 or more years of continuous service who is not specified in another item in this Part
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
  - a. the Commonwealth or a Commonwealth authority; or
  - b. a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution
- Member of the Australasian Institute of Mining and Metallurgy
- An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- An officer with, or a credit representative of, a holder of an Australian credit licence, having 2 or more years of continuous service with one or more licensees
- A person authorised as a notary public in a foreign country.

## How to return this form

### Provide to your Adviser

Provide this form to your Financial Adviser to upload on your behalf via the IconiQ portal (Portfolios > Reports & Documents > Submit Superannuation/IDPS Documents).