

Investment Estate Management Notification

Legal personal representatives of a client can use this form to:

- Notify us of a client's death; and
- Nominate a person or company ("Representative") to act on behalf of the executor or administrator to manage the portfolio/s after the client passes away.

Documents Required (if not previously provided):

- ☐ Death Certificate
- ☐ Will of the deceased (if one exists)
- ☐ Copy of the Probate or Letters of Administration

An Administrator/Executor/s will need to provide a certified copy of one of the following documents:

- ☐ Australian State/Territory driver's licence
- ☐ Australian passport or
- ☐ Card issued under a law of a State or Territory for the purpose of providing a person's age which contains a photograph of the person

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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Section B: Appoint a Representative

I/we appoint the person/company named below and authorise them to make enquiries regarding the Portfolio listed in Section 1 of this document. I/we understand that this authorisation DOES NOT extend to making instructions, such as redemption or transmission instructions, or change of distribution details or address details, on my/our behalf.

Name of Nominated Representative

Address

Suburb

State

Postcode

Country

Email Address

Phone Number

Section C: Declaration

Authorised by (must be signed by all executors/administrators):

Executor/Administrator 1

Full Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Executor/Administrator 2

Full Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
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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 Documents).

Your Privacy

When you provide instructions to IconiQ Investment, IconiQ Investment 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

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Issued by:

Ventura Investment Management Ltd

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