



# Authority to advise valid for 12 months

Use this form to authorise a personal financial adviser to be paid a fee from your smartMonday account balance and/or to view and transact on your smartMonday account (regardless of whether a fee is paid). You can authorise an ad hoc fee (paid once), a fee paid monthly, or a mix of both. You or your adviser can complete section 1 of this form. Your adviser must complete sections 2, 3, 4 and 5 (if applicable). You must then complete section 6 of this form, after your adviser has completed the adviser sections.

smartMonday must obtain your written consent before advice fees can be deducted from your smartMonday account. If you do not agree with the amount described below, you do not have to sign this consent. You may vary or withdraw your consent at any time by notifying your adviser or smartMonday in writing.

## 1. Member details

If you have any questions or want to withdraw your consent, please contact us on the following details.

ph: 1300 614 644

email: [enquiry@smartmonday.com.au](mailto:enquiry@smartmonday.com.au)

Member number

Date of birth

smartMonday account type *(select one only. If your adviser will be servicing multiple accounts, or if you are authorising an advice fee to be deducted from multiple accounts, please complete a separate form for each):*

PRIME

PENSION

Given names

Surname

Address

Suburb

State

Postcode

Mobile

Email

## 2. Your adviser details

*Adviser to complete*

Adviser name

Adviser smartMonday code

Adviser AR number

Business name

(Corporate) Authorised Representative of...

Licensee name

Licensee AFSL

Adviser phone

Adviser email



#### 4. Services you will be entitled to receive from your adviser

*Adviser to complete*

Your adviser will provide the following services to you:

#### 5. Adviser declaration

*Adviser to complete*

As the member's nominated financial adviser, I understand that:

- › Any advice fee deducted from the member's smartMonday account meets the sole purpose test.
- › I must retain evidence that the services and advice fees meet the sole purpose test and upon request, provide this evidence to the Trustee, or I may be required to refund the advice fee to the member.
- › The Trustee can decline this request, and at any time, cease or suspend payments of the advice fee, and/or cease or suspend my authority to access and service the member's smartMonday account.
- › I must provide the services stated on this form to the member and retain evidence of this which I may be asked to provide to the Trustee, or I may be required to refund the advice fee to the member.

Adviser's signature

Date (DD/MM/YYYY)

#### 6. Member declaration and authorisation

Consent for your adviser (and their authorised delegates) to have online access to your smartMonday account *Member to complete*

**Servicing authority:** Tick the box to appoint your adviser access to your account. (You do not need to be paying an advice fee to appoint access to your adviser).

I wish to appoint the adviser nominated in *Your adviser details* section as my authorised and servicing adviser. I understand this consent will remain in place for 12 months, and request:

- that all relevant information and servicing rights for my smartMonday account be passed on to my adviser.
- that my adviser, and any authorised adviser delegates, will have access via the Adviser Online Portal to details of my smartMonday account, and (when requested by me) is able to update my details, transact on my account, and switch my investment options.

Consent to pay an advice fee  
*Member to complete*

**Advice fee authority:** Tick the box to authorise the advice fees detailed in *Section 3* of this form to be deducted from your smartMonday account.

I authorise the fee shown in *Section 3* of this form to be deducted from my smartMonday account balance and paid to my adviser.

I understand that:

- › The advice fee is solely to pay for financial advice related to my smartMonday account.
- › My consent to deduct the advice fees from my smartMonday account will last no longer than 12 months. I will need to provide my consent again if any further fees are to be deducted from my account. I can withdraw my consent at any time by contacting smartMonday.

#### General authority

- › I understand that I can cancel either or both of the above authorities at any time by giving notice in writing to the Trustee of smartMonday.

Member's signature

Date (DD/MM/YYYY)