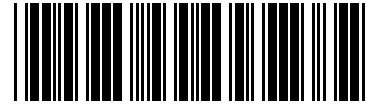


Adviser Online Transaction Authority



Please phone Colonial First State Investor Services on **13 13 36** with any enquiries.

SAVE FORM

Please complete this form using **BLACK INK** and print well within the boxes in **CAPITAL LETTERS**. Start at the left of each answer space and leave a gap between words. Please cross appropriate answer boxes.

PRINT FORM

1 INVESTOR DETAILS

Please nominate the accounts to which the authority should be applied.

All accounts I hold with Avanteos Investments Limited (AIL) and/or Colonial First State Investments Limited (CFSIL)

OR

Only the following accounts (if for this account now being applied for write 'this account')

This authority can only be applied to accounts currently advised by the adviser named in **section 2** (below).

INVESTOR 1 (individual accounts)

Title
Mr Mrs Miss Ms Other

Given name(s)

Surname/Company/Partnership name

Contact phone number

Date of birth
 (dd/mm/yyyy)

INVESTOR 2 (joint accounts)

Title
Mr Mrs Miss Ms Other

Given name(s)

Surname/Company/Partnership name

Contact phone number

Date of birth
 (dd/mm/yyyy)

2 ADVISER DETAILS

Adviser name

Phone number Fax number

Work phone number

Dealer ID Adviser ID

Dealer/Adviser stamp (please use black ink only)

INVESTOR(S) MUST SIGN THIS FORM OVER THE PAGE.

3 DECLARATION

CONDITIONS FOR AUTHORISING AN ADVISER TO TRANACT ON YOUR BEHALF

By signing this authority you authorise the named adviser, and any other person authorised by that adviser (authorised delegate), to have details of your investments for each Avanteos Investments Limited (AIL) and/or Colonial First State Investments Limited (CFSIL) account(s) identified in section 1 and to perform the following activities on your account via AIL and/or CFSIL online facilities such as FirstNet Adviser and FirstNet e-Post (if available) on your behalf:

- make an additional investment, set up or modify a regular investment plan (including modifying the adviser fees as agreed by you and your adviser from time to time) and switch between investment options
- modify personal and account details (except bank account details)
- modify investment selection and frequency (including auto-rebalancing and elections in relation to managed accounts)
- withdraw an investment
- superannuation and pension withdrawals (excluding transfers and rollovers)
- transact on FirstRate products (including managing maturity instructions).

This adviser online transaction authority is subject to the following:

- You agree that the named adviser remains authorised, even if this adviser transfers to a new dealer group (with the current dealer's release) and changes to new arrangements without notice to you.
- If the dealer group's Australian Financial Services Licence is suspended or cancelled by the Australian Securities and Investments Commission, we have the discretion to switch off the adviser authority.
- If we reasonably believe that a person is your authorised adviser or their authorised delegate, then anything they do on your behalf will be treated as if you have done it personally.
- Once you sign this authority, then we will treat your adviser (or their delegate) as being properly appointed unless you tell us otherwise.
- At our complete discretion, we can refuse to accept an authority, permit a person to transact or carry out a transaction.
- You agree to release, discharge and indemnify us from and against any liability, cost or loss that is incurred by us or you as a result of our acting on this authority except if we have

acted fraudulently or have wilfully defaulted in our obligations to you and you acknowledge we will process transactions under this authority until we receive a valid written notification, signed by you, amending or revoking this authority.

- This authority continues until the second business day after we receive written notice from you of cancellation of the authority.
- Use of AIL's and/or CFSIL's online facilities is subject to specific terms and conditions (including e-Post declarations and FirstNet Adviser terms and conditions). These are available on each respective internet sites. At our complete discretion, we can refuse access or suspend access to AIL's and/or CFSIL's online facilities.
- We can cancel or vary these conditions by giving you not less than seven (7) days written notice.
- If during our normal business hours any of our online facilities are not available or online transactions are not being processed (as determined by us), then this authority will permit your adviser (or their delegate) to transact on your behalf using fax instructions. The terms of fax usage which will then apply are set out in the Reference Guide – Transacting on your account.

You acknowledge and agree that:

- In the event that your account balance is transferred, but the trustee does not change (for example a Successor Fund Transfer/Intra-Fund Transfer) this adviser authority to transact may transfer to the new account.

Note:

- The adviser may also delegate this authority to third parties, such as others in their office. Therefore you should carefully consider the implications of giving this authority before proceeding.
- The adviser and the authorised delegate will be authorised to carry out these activities using AIL's and/or CFSIL's online facilities only.
- We will not accept or be on notice of any restrictions on their authority and therefore all instructions provided by your adviser and/or their delegate under this authority will be taken to be authorised by you. Depending on your arrangements with your adviser, it is possible your adviser may provide an instruction to us without notice to you.
- Investments and withdrawals can only be made to and from a bank account pre-nominated by you.

PLEASE NOTE THAT BY APPOINTING AN ADVISER TO TRANACT ON YOUR BEHALF, YOU ARE GIVING THAT ADVISER, AND ANY PERSON ACTING ON BEHALF OF THE ADVISER, AUTHORITY TO TRANACT AND MODIFY DETAILS ON YOUR ACCOUNT(S), UNTIL WE RECEIVE A VALID WRITTEN NOTIFICATION, SIGNED BY YOU, AMENDING OR REVOKING THIS AUTHORITY.

Joint applicants must both sign.

Original signature of investor 1 or company officer

Print name

Date signed

 (dd/mm/yyyy)

Original signature of investor 2 or company officer (if applicable)

Print name

Date signed

 (dd/mm/yyyy)

Please send the completed form to:
Colonial First State, Reply Paid 27, Sydney NSW 2001
or via the secure online system (e-Post) with FirstNet Investor and FirstNet Adviser