



# WealthFocus, Wholesale Funds, Cash Management Fund, Pure Series Funds, Select, Trust Company Investment Funds and Trillium Funds

Perpetual Investment Management Limited ABN 18 000 866 535, AFSL 234426  
Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315

## Adviser registration and myPerpetual delegate access form

Use this form to register advisers and their delegates to access myPerpetual online accounts.

### 1. Adviser's personal details

#### Title

Mr  Mrs  Miss  Ms other  \_\_\_\_\_

first name(s)

\_\_\_\_\_

date of birth (please complete for security reasons)

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

last name

\_\_\_\_\_

Do you have an existing Adviser code issued by Perpetual?

yes, insert Adviser code \_\_\_\_\_

Go to **section 2**.

no, an Adviser code will be issued. If 'no' please complete address and contact details.

#### Office address

street number and name

\_\_\_\_\_

suburb (if relevant) **OR** city

\_\_\_\_\_

state

\_\_\_\_\_

postcode

\_\_\_\_\_

#### Postal address (if different from office address)

street number and name

\_\_\_\_\_

suburb (if relevant) **OR** city

\_\_\_\_\_

state

\_\_\_\_\_

postcode

\_\_\_\_\_

#### Contact details

work phone number

\_\_\_\_\_

mobile phone number

\_\_\_\_\_

email address

\_\_\_\_\_

Dealer group name

\_\_\_\_\_

AFSL number

\_\_\_\_\_

Dealer group code (if applicable)

\_\_\_\_\_

Authorised representative number/reference

\_\_\_\_\_

## 2. myPerpetual delegate online registration

An adviser's level of access is determined by the client. An adviser's level of online access will extend to their authorised delegates. If you require delegate access please complete the below section.

The adviser named in section 1 of this form is authorising the delegate(s) in this section to have the same online access as the adviser.

Delegate name and contact details	Signature of delegate
<p>name  <input type="text"/></p> <p>date of birth                      phone number  <input type="text"/> / <input type="text"/> / <input type="text"/>      <input type="text"/></p> <p>email  <input type="text"/></p> <p>address  <input type="text"/></p>	<p><input type="text"/></p> <p>name <input type="text"/></p> <p>date <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>I agree to be appointed a delegate of the adviser set out in section 1 of this form. I confirm that I have read and agree to be bound by the terms and conditions as set out in section 4 of this form. I understand the code and password assigned to me are personal to me.</p>
<p>name  <input type="text"/></p> <p>date of birth                      phone number  <input type="text"/> / <input type="text"/> / <input type="text"/>      <input type="text"/></p> <p>email  <input type="text"/></p> <p>address  <input type="text"/></p>	<p><input type="text"/></p> <p>name <input type="text"/></p> <p>date <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>I agree to be appointed a delegate of the adviser set out in section 1 of this form. I confirm that I have read and agree to be bound by the terms and conditions as set out in section 4 of this form. I understand the code and password assigned to me are personal to me.</p>
<p>name  <input type="text"/></p> <p>date of birth                      phone number  <input type="text"/> / <input type="text"/> / <input type="text"/>      <input type="text"/></p> <p>email  <input type="text"/></p> <p>address  <input type="text"/></p>	<p><input type="text"/></p> <p>name <input type="text"/></p> <p>date <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>I agree to be appointed a delegate of the adviser set out in section 1 of this form. I confirm that I have read and agree to be bound by the terms and conditions as set out in section 4 of this form. I understand the code and password assigned to me are personal to me.</p>
<p>name  <input type="text"/></p> <p>date of birth                      phone number  <input type="text"/> / <input type="text"/> / <input type="text"/>      <input type="text"/></p> <p>email  <input type="text"/></p> <p>address  <input type="text"/></p>	<p><input type="text"/></p> <p>name <input type="text"/></p> <p>date <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>I agree to be appointed a delegate of the adviser set out in section 1 of this form. I confirm that I have read and agree to be bound by the terms and conditions as set out in section 4 of this form. I understand the code and password assigned to me are personal to me.</p>

## 2. myPerpetual delegate online registration (continued)

Delegate name and contact details	Signature of delegate
<p>name <input type="text"/></p> <p>date of birth <input type="text"/> / <input type="text"/> / <input type="text"/>      phone number <input type="text"/></p> <p>email <input type="text"/></p> <p>address <input type="text"/></p>	<p><input type="text"/></p> <p>name <input type="text"/></p> <p>date <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>I agree to be appointed a delegate of the adviser set out in section 1 of this form. I confirm that I have read and agree to be bound by the terms and conditions as set out in section 4 of this form. I understand the code and password assigned to me are personal to me.</p>

If you require access to be provided to more than 5 delegates, please attach multiple copies of this section of the form.

## 3. Adviser declaration

I authorise for the delegates named in section 2 of this form to be given the same level of online access that has been given to me by a client. I understand that I am responsible for all of my delegates' actions and use of myPerpetual. I will promptly inform Perpetual if any delegate no longer requires myPerpetual online access.

### Signature of adviser

<input type="text"/>	name <input type="text"/>
	date <input type="text"/> / <input type="text"/> / <input type="text"/>

## 4. myPerpetual authorised representatives, adviser and adviser's authorised delegate terms and conditions

In these Conditions of Use "we", "us" and "Perpetual" means Perpetual Investment Management Limited, Perpetual Superannuation Limited or Perpetual Trustee Company Limited. "Perpetual Group" means Perpetual Limited and its subsidiaries. "You" or "your" means the person that has an interest in a financial product offered or issued by us.

By accepting these Conditions of Use, your Authorised Representative, adviser and/or adviser's authorised delegate will be able to do either of the following through myPerpetual:

- view information about your investments and transact online in respect of these investments (default); or
- view information about your investments, where you have expressly elected this level of access in your application form to us, or subsequent instructions to us.

The adviser may extend to their authorised delegate the same level of online access you have determined for your adviser.

The following conditions apply:

Your Authorised Representative and/or adviser will be able to access all the information you would be able to access yourself and/or transact on your behalf with their unique myPerpetual login (or view only, where you have elected this level of access for your Authorised Representative and/or adviser). An adviser's authorised delegate will be able to access the same level of online access you have determined for your adviser. By accepting these Conditions of Use you acknowledge that all actions performed by the Authorised Representative(s), adviser and/or adviser's authorised delegate is/are taken to be an action by you and all actions performed by any person using your Authorised Representatives', advisers' and/or adviser's authorised delegates' myPerpetual login are also taken to be an action by you.

Also, an adviser acknowledges that by accepting these Conditions of Use that all actions performed by its authorised delegate(s) on myPerpetual is/are taken to be an action by the adviser.

"Transact" means the ability to modify and update information relating to your contact details and accounts online (including bank account details) and transact online on your behalf including apply, withdraw, switch units and set up automatic functions (such as a savings plan) where and when these facilities become available.

This authority continues until we receive notification from you in writing that your Authorised Representative(s) and/or adviser's authorisation is revoked.

Also, an adviser may revoke, at any time, the online account access that has been given to one or more of their delegates.

We will give access to all your account information and the ability to transact online (or view only access, where you elect for your Authorised Representative and/or adviser to have this level of access) to:

- Your Authorised Representative(s) and/or adviser and any person who uses their myPerpetual login.
- Who complies with any other security procedure that we may use from time to time.

## 4. myPerpetual authorised representatives, adviser and adviser's authorised delegate terms and conditions (continued)

An adviser may elect to extend to their authorised delegates the same level of online account access you have determined for your adviser. You must tell us immediately if:

- You suspect that any unauthorised person has gained access to your Authorised Representatives', advisers' and/or authorised delegates' myPerpetual login; or
- You believe that the security of your Authorised Representatives', advisers' and/or authorised delegates' myPerpetual account has been compromised, or
- In the case of any person to whom Perpetual has issued a myPerpetual login in relation to your entity ceases to be your employee or agent or you cease to be an employee or agent, as the case may be.

An adviser must tell us immediately if one of their authorised delegates ceases to be an employee of the company or licensee or ceases to require myPerpetual online account access.

There may be times when we cannot provide access to myPerpetual although we will use all reasonable efforts to enable your Authorised Representative(s), adviser and/or adviser's authorised delegate to have access.

We can only take responsibility for the reliability of data and information that is within our control and which is not data or information provided to us by a third party. We are not responsible for transmissions of any computer virus or other unwanted programs or information resulting from or associated with your Authorised Representatives', adviser's or adviser's authorised delegates' use of myPerpetual.

We are not responsible for the accuracy or content of information or material which is provided to us by a third party or which we provide to your Authorised Representative(s), adviser and/or adviser's authorised delegate and which your Authorised Representative(s), adviser and adviser's authorised delegate edit, amend, alter and then provide to any third party or provide in a different form from that on myPerpetual.

An adviser is responsible for any edits, amendments, alterations made by its authorised delegates in respect of your information.

Perpetual is not liable to your Authorised Representative, your adviser or any party including to whom you disclose any information or material to.

We may suspend or cancel your Authorised Representatives', adviser's and/or adviser's authorised delegate's access to myPerpetual without notice, but if possible, we will give you notice before we do so.

We reserve the right to vary these terms and conditions, in our sole discretion, from time to time. Variations to these terms and conditions may be notified to you, your Authorised Representative, adviser and/or adviser's authorised delegate via electronic disclosure, including on myPerpetual or the Perpetual website ([www.perpetual.com.au](http://www.perpetual.com.au)). It is your, your Authorised Representative's, adviser's and/or adviser's authorised delegate's responsibility to stay up to date with any changes to these terms and conditions. You agree that the provision of updated terms and conditions is sufficient notice of any change. If you do not agree to the updated terms and conditions, you must cease using myPerpetual. By logging into myPerpetual after any significant update is made to these terms and conditions, you accept and agree to be bound by the terms and conditions, as amended.

We may communicate with you, your Authorised Representative, adviser and/or adviser's authorised delegate in relation to your use of myPerpetual by email or other forms of electronic communication.

We have complete discretion to refuse or accept an authority to access myPerpetual on behalf of an account. We have complete discretion to refuse or accept any transaction made in connection with this authority.

You agree to the terms and conditions of myPerpetual available on our website at [www.perpetual.com.au](http://www.perpetual.com.au).

We may give your Authorised Representative(s), adviser and/or adviser's authorised delegates notices (which have also been provided to you) in relation to the use of myPerpetual by email or other forms of electronic communication.

You authorise Perpetual and any other company within the Perpetual Group and any agents it may appoint to use your Authorised Representatives', advisers' and/or adviser's authorised delegates' personal information for the delivery of the myPerpetual service and agree to procure such authorisation from your Authorised Representatives and/or adviser. An adviser agrees to procure such authorisation from their authorised delegates.

You acknowledge that anything associated with or available through myPerpetual belongs to Perpetual or other third parties and is protected by intellectual property rights.

You agree that a payment or purported payments (the payment) made in accordance with these conditions shall be in complete satisfaction of our obligations or those of any member of the Perpetual Group to you for a payment, notwithstanding it was requested, made or received without your knowledge or authority.

You release, discharge and indemnify Perpetual from and against all liabilities suffered or incurred by you or your Authorised Representatives, adviser and/or adviser's authorised delegate by Perpetual or any other member of the Perpetual Group (including but not limited to its directors, officers, employees) as a result of the use of myPerpetual.

1. Please ensure the form is signed.
2. Send form to [adviser\\_maintenance@perpetual.com.au](mailto:adviser_maintenance@perpetual.com.au)

If you have any questions about completing this form please call us on 1800 062 725.

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