

Aberdeen Standard Investments Australia Limited (ABN 59 002 123 364, AFSL 240263) is the Issuer and Responsible Entity of the Funds offered by Aberdeen Standard Investments in Australia ('the Funds').

This form can be used by existing unitholders in the Funds to provide or change personal, fund and financial adviser details.

To provide or change tax details (including tax file numbers, tax residency and tax status), please complete a Change of Tax Details Form.

This form is not to be used for accounts made through the mFund Settlement Service ('mFund'). mFund investors should contact their broker to update changes to update their records on their behalf.

The information collected in this form is governed by the Aberdeen Standard Investments privacy policy which is available at [www.aberdeenstandard.com.au](http://www.aberdeenstandard.com.au), or by contacting the Aberdeen Standard Investments Client Service team.

If you have any questions about completing this form, please contact the Aberdeen Standard Investments Client Service team on 1800 636 888 (Australian investors), 0800 446 439 (if calling from New Zealand) or +61 2 9950 2853 (if calling from outside Australia or New Zealand). Alternatively, you may wish to email us at [client.service.aust@aberdeenstandard.com](mailto:client.service.aust@aberdeenstandard.com)

Please print in blue or black pen within the boxes in CAPITAL LETTERS. Mark appropriate boxes with an

Reason for completing this form (please select  one or more of the following options):

Type of change:

- Change investor/trustee name
- Change investor's own contact details
- Change mailing address (for ALL correspondence)
- Change of name of a company, trust or superannuation fund, or change of trustee
- Change distribution method
- Change Australian bank account details
- Change Annual Financial Report election
- Change financial adviser details

Review and complete sections:

- 1, 2, 3, 11 and 12 (plus provide an originally certified copy of supporting documentation)
- 1, 2, 4, 11 and 12
- 1, 2, 5, 11 and 12
- 1, 2, 6, 11 and 12 (plus provide an originally certified copy of supporting documentation)
- 1, 2, 7, 11 and 12
- 1, 2, 8, 11 and 12
- 1, 2, 9, 11 and 12
- 1, 2, 10, 11 and 12

## 1. Existing details

Investor number

## 2. Investor details

### Investor 1/Trustee 1/Director 1

Surname

Given name(s)

Title  Mr  Mrs  Miss  Ms  Dr

Date of birth   /   /

### Investor 2/Trustee 2/Director 2 (if applicable)

Surname

Given name(s)

Title  Mr  Mrs  Miss  Ms  Dr

Date of birth   /   /

**3. Change investor name**

**Investor 1/Trustee 1/Director 1**

Surname

Given name(s)

Title  Mr  Mrs  Miss  Ms  Dr

Old signature  New signature

Please also sign the Section 12 using your new signature.

**Investor 2/Trustee 2/Director 2 (if applicable)**

Surname

Given name(s)

Title  Mr  Mrs  Miss  Ms  Dr

Old signature  New signature

Please also sign the Section 12 using your new signature.

**Supporting documentation to accompany this Form**  
 An original certified copy of the relevant documents detailed below must accompany a request to change an investor name on our records:

Circumstance	Documentation required
• Change of name due to marriage	• Original certified copy of a Marriage certificate issued by the Office of Births, Deaths and Marriages
• Change of name due to a formal name change	• Original certified copy of a Change of Name certificate
• Change of name to former maiden name	• Original certified copy of a Birth certificate • Original certified copy of a Marriage certificate

**4. Change investor's own contact details**

For security purposes please ensure both existing and new details are completed.

**Existing contact details**

C/- (if applicable)

Street address

Suburb  State

Postcode  Country

Phone numbers (AH)  (BH)   
 (Mob)  (Fax)

Email address

**New contact details (must be investors own details and not a PO Box)**

If you have moved overseas, please also refer to the Change of Tax Details Form as you may need to update your tax status. A Change of Tax Details Form can be downloaded from the website, [aberdeenstandard.com.au](http://aberdeenstandard.com.au). Alternatively, you can request a copy by contacting the Client Service team.

C/- (if applicable)

Street address (not a PO Box)

Suburb  State

Postcode  Country

Your main country of residence if not Australia

Phone numbers (AH)  (BH)   
 (Mob)  (Fax)

Email address<sup>1</sup>

<sup>1</sup>By nominating this email address, you agree that we may use it to deliver to you information about your investment (such as transaction confirmations, statements and reports) and financial services disclosures (such as any new PDS for the Fund). From time to time we may still need to send you letters in the post.

**5. Change mailing address (for ALL correspondence)**

As per section 4 above       Other (complete details below)

New C/- (if applicable)   
 New street address   
 New suburb       New State     
 New postcode          New Country   
 New email address<sup>2</sup>

**6. Change of name of a company, trust or superannuation fund, or change of trustee**

Existing name/trustee   
 New name/trustee

**Supporting documentation to accompany this Form.**  
 An original certified copy of the relevant documents detailed below must accompany a request to change a company, trust or superannuation fund, or trustee name on our records:

Circumstance	Documentation required
• Change of company name	• Certificate of registration of change of name issued by ASIC
• Change of trust name for SMSF and other trusts type	• Deed of Amendment indicating the change in the trust name
• Change of trustee for an SMSF	• Deed of Amendment indicating the change of trustee
• Change of trustee for trusts other than SMSF (e.g. family trust)	• Deed of Amendment indicating the change of trustee
	• Acceptable ID for each newly appointed individual trustees or beneficial owners of the corporate trustee

**7. Change distribution method<sup>3</sup>**

Your nomination in this section overrides previous nominations

Automatic reinvestment       Payment by direct deposit into the following Australian or New Zealand bank account

Name of bank   
 Account name   
 BSB            Account number

**8. Change bank account details<sup>4</sup>**

Please provide your new Australian or New Zealand bank account bank account details.

Name of bank   
 Account name   
 BSB            Account number

**9. Change Annual Financial Report election**

I/we don't want to receive an Annual Financial Report for the Fund/s in which I/we are invested.  
 I/we would like to receive a hard copy of the Annual Financial Report for the Fund/s in which I/we are invested.

<sup>2</sup>By nominating this email address, you agree that we may use it to deliver to you information about your investment (such as transaction confirmations, statements and reports) and financial services disclosures (such as any new PDS for the Fund). From time to time we may still need to send you letters in the post.  
<sup>3,4</sup>By providing bank details in this section you authorise Aberdeen Standard Investments to retain and use these details for all future transaction requests, including payment of distributions (if you have elected to have distributions paid to a bank account), redemptions payments, and Fund termination payments (if applicable). New Zealand bank accounts can only be used by unitholders invested in Funds offered in New Zealand.

10. Change financial adviser details

I no longer have a financial adviser and instruct Aberdeen Standard Investments to remove the financial adviser details on my account.

I am changing the financial adviser on my account.

By completing this section you consent to give your new financial adviser access to your information and authorise your new financial adviser to make enquiries on your behalf for the Fund/s.

Adviser name	<input type="text"/>	AFSL number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Dealer Group	<input type="text"/>		
Adviser address	<input type="text"/>	State	<input type="text"/> <input type="text"/> <input type="text"/>
Suburb	<input type="text"/>		
Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Country	<input type="text"/>
Phone numbers	(AH) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
	(Mob) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
Email address <sup>5</sup>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>		

11. Declaration

I/we declare that:

- I/we have read and understood the current PDS;
- I/we are not in the United States or a 'US Person' (as defined in Regulation S under the US Securities Act 1933, as amended) ('US Person'), or acting for the account or benefit of a US Person. I/we understand that units in the Fund may not be offered to a US Person and agree that my/our units may not be sold or transferred to a US Person (directly or indirectly) without Aberdeen Standard Investments' prior consent. Notwithstanding the foregoing, if my/our investment becomes a US account, I/we will promptly notify Aberdeen Standard Investments and provide Aberdeen Standard Investments on request with any information which is necessary or desirable for Aberdeen Standard Investments to comply with any obligations it may have in connection with FATCA;
- I/we acknowledge that if my/our country of residence changes I/we may be prevented from making further investments in the Fund;
- I/we will provide further information or personal details to Aberdeen Standard Investments as requested to meet obligations under AML/CTF and taxation laws (including FATCA and CRS) and other regulatory requirements;
- I/we consent to (and have obtained all necessary consents from all controlling persons if any) the personal information provided to Aberdeen Standard Investments being collected, used, processed, stored, transferred and disclosed to administer my/our investment and comply with any relevant laws (including FATCA and CRS) in accordance with the PDS and Aberdeen Standard Investments' privacy policy;
- I/we acknowledge and agree that Aberdeen Standard Investments may be required to disclose my/our personal information (and personal information of any controlling person) and financial information about my/our investment to Aberdeen Standard Investments' service providers and their related bodies corporate and to relevant local and foreign regulatory and tax authorities, including for compliance with AML/CTF, FATCA, CRS and any other relevant regulatory and tax related requirement;
- all details provided in this Form and any relevant Identification Form are true and correct in every respect and may and will be relied upon by Aberdeen Standard Investments;
- any documents or information whatsoever used for verification purposes in support of my/our application are complete and correct; and
- if there is a change to any of the information provided in this Form or other documents submitted for AML/CTF, FATCA, CRS or other purposes, I/we will notify Aberdeen Standard Investments immediately and within 30 days will submit a new Change of Tax Details Form and such other documents as requested by Aberdeen Standard Investments.

<sup>5</sup>By nominating this email address, you agree that we may use it to deliver to your adviser information about your investment (such as transaction confirmations, statements and reports) and financial services disclosures (such as any new PDS for the Fund). From time to time we may still need to send you letters in the post.

**12. Signatures**

**Please sign and date the Form:**

- All investors must sign.
- If there is one signatory for a company, they confirm that they are sole director and company secretary of the company.
- If this form is signed under Power of Attorney the attorney declares that no notice of revocation of that power has been received. An originally certified copy of the Power of Attorney must be provided, together with a completed and signed Identification Form (with supporting documentation) from the Attorney.

Name

Date   /

Signature

Director

Sole director

Name

Date   /

Signature

Director

Company Secretary

**Return this form and supporting documentation to Aberdeen Standard Investments:**

Please post or fax the completed and signed form (please note that original certified documents must be sent by post).

<p><b>Post</b>                  Aberdeen Standard Investments                  C/- Citi Unit Registry Australia                  GPO Box 764                  Melbourne VIC 3001</p>	<p><b>Fax</b>                  C/- Citi Unit Registry Australia                  1300 101 688 (Australia Investors)                  +61 1300 101 688 (International investors)</p>
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