## Change Adviser Details Form



For the Russell Private Active Pension

## Use this form to advise any changes to your adviser details. Please complete the relevant sections in BLOCK LETTERS.

We will send information relating to your account balance to your adviser. Please note that an adviser service fee will not be paid unless authorised on this form or the original *Application Form*.

Copies of transaction confirmations, member statements and other communications will be sent to advisers, generally by email.

Adviser line

Toll free on 1800 458 272

We will generally accept instructions from your adviser when we receive a Power of Attorney that allows your adviser to act on your behalf. You must notify us if the Power of Attorney becomes void or redundant, or if you decide to change advisers.

Your completed form should be sent to the following address:

Russell Private Active Pension Locked Bag A4094 Sydney South NSW 1235

Fax: (02) 9372 6288

You can also contact us as follows:

Helpline Toll free on 1800 300 353 Operating hours are from Monday to Friday, 9am – 5pm (Sydney time). Website www.russell.com.au/retirement Email russellpension@russellsuper.com

## 1. Adviser contact details

Mark box if there is NO change to your adviser's contact details.

If your adviser's details have changed or you are changing adviser, you should ask the adviser to complete their details (including their email address and fax number), sign and stamp this form.

a.	Dealer group name	AFS licence number					
b.	Company name						
c.	Adviser name						
d.	Adviser/Company address						
	State	Postcode					
e.	Adviser email for confirmation (if required)						
f.	Telephone     g.     Fax       ( )     ( )     ( )						
h.	h. Please mark one option only and complete the relevant details:						
Option 1 - Authorised representatives of licensed dealer groups							
	I declare that I am authorised to sign on behalf of the licensed dealer group. On behalf of the dealer group I acknowledge and agree that the Trustee may cease or vary the adviser service fee if so notified by the applicant. The dealer group and I are neither the agents nor partners of the Trustee or a company in the Russell Investment Group. SIGNATURE OF THE ADVISER						
	OR						

In preparing this form the Trustee has not taken into account the investment objectives, financial situation and particular needs (financial circumstances) of any person. Accordingly, before acting on any advice, you should assess whether the advice is appropriate in light of your own financial circumstances.

Page 1 of 3

Please complete all

pages of this form

Adviser stamp         Adviser service fee         OSCING ADVISER SERVICE FEE         You adviser is required to sign this section unless the adviser service fee is being reduced to zero.         If you and your client have agreed an ongoing adviser service fee, please select one of the following percentages of the value of the investment forcluding GST volume in the pay you which is to be paid monthly from your client's account on approximately the last business day of the month. We will redeen units to this amount from your client's account and pay you/your dealer group which will the pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account and pay you/your dealer group which will the pay you (the adviser), as per the instructions below. The ongoing adviser service fee annual dollar amount functuding GST <ul> <li></li></ul>	Option 2 - Licensed financial advisers	
You should speak to your adviser about this decision.         Adviser stamp         Adviser stamp         Adviser stamp         Adviser service fee         ONGOING ADVISER SERVICE FEE         You adviser is required to sign this section unless the adviser service fee is being reduced to zero.         If you advour client have agreed an ongoing adviser service fee, please select one of the following percentages of the value of the investment functuding GST or nominate a fixed dollar amount per annum (including GST) which is to be paid monthy from your client's account on approximately the last business day of the month. We will redeem units to this amount from your client's account and apy you/your deleafer group accordingly. The payment will be made to the dealer group which will then pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account until they notify us of the contrary in writing.         Percentage (including GST)         Image: Including GST         Image:	and acknowledge and agree that the Trustee may cease or vary the adviser service fee if so notified by the applicant. I am not an agent nor a partner of the Trustee or	SIGNATURE OF THE ADVISER
Adviser stamp         Adviser service fee         OSCING ADVISER SERVICE FEE         You adviser is required to sign this section unless the adviser service fee is being reduced to zero.         If you and your client have agreed an ongoing adviser service fee, please select one of the following percentages of the value of the investment forcluding GST volume in the pay you which is to be paid monthly from your client's account on approximately the last business day of the month. We will redeen units to this amount from your client's account and pay you/your dealer group which will the pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account and pay you/your dealer group which will the pay you (the adviser), as per the instructions below. The ongoing adviser service fee annual dollar amount functuding GST <ul> <li></li></ul>		
ONGOING ADVISER SERVICE FEE         You adviser is required to sign this section unless the adviser service fee is being reduced to zero.         If you and your client have agreed an ongoing adviser service fee, please select one of the following percentages of the value of the investment functuding GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid monthly from your client's account on approximately the last business day of the month. We will redeem units to this amount from your client's account and pay you/your dealer group accordingly. The payment will be made to the dealer group which will then pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account until they notify us of the contrary in writing.         Percentage (including GST)            0.00% p.a.         0.275% p.a.         0.55% p.a.         0.775% p.a.         1.00% p.a.         1.10% p.a.         0.00 The initial adviser service fee can be zero.             Ø R             Fixed annual dollar amount (including GST)             Ø Mark this box if you want us to index the fixed dollar amount by Average Weekly Ordinary Time Earnings (AWOTE) each 1 July. Percentage fees cannot be indexed.             OKGOING ADVISER SERVICE FEE SPLIT BETWEEN DEALER GROUP AND ADVISER*          Plealer group         0.         % p.a.         0.0         % p.a.	Adviser stamp	
Your adviser is required to sign this section unless the adviser service fee is being reduced to zero.         If you and your client have agreed an ongoing adviser service fee, please select one of the following percentages of the value of the investment (including GST) which is to be paid monthly from your client's account an approximately the last business day of the month. We will redeem units to this amount from your client's account and pay you/your dealer group accordingly. The payment will be made to the dealer group which will then pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account until then pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account until they notify us of the contrary in writing.         Percentage (including GST)            0.00% p.a.         0.275% p.a.         0.55% p.a.         0.775% p.a.         1.00% p.a.         1.10% p.a.         0/ther (up to 1.10% p.a.)         0.00         R         Fixed annual dollar amount (including GST)            0.00            0.00         Y          0.00         Y          0.00         Y          0.00         Y          0.00         Y          0.00         The initial adviser service fee can be zero.         1.00% p.a.         1.00% p.a.         1.00% p.a.         Y          0.00         The initial adviser service fee can be zero.         1.10% p.a.	Adviser service fee	
If you and your client have agreed an ongoing adviser service fee, please select one of the following percentages of the value of the investment (including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid monthly from your client's account on approximately the last business day of the month. We will redeem units to this amount from your client's account and pay you/your dealer group accordingly. The payment will be made to the dealer group which will then pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account until they notify us of the contrary in writing.  Percentage (including GST)  Output (up to 1.10% p.a.) 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.10% p.a. 0.10% p.a. 0.00% p.a. 0.275% p.a. 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.10% p.a. 0.00% p.a. 0.275% p.a. 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.10% p.a. 0.00% p.a. 0.0110% p.a.) 0.00% p.a. 0.0275% p.a. 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.00% p.a. 0.00% p.a. 0.0110% p.a.) 0.00% p.a. 1.10% p.a. 0.00% p.a. 0.0275% p.a. 0.00% p.a. 0	ONGOING ADVISER SERVICE FEE	
If you and your client have agreed an ongoing adviser service fee, please select one of the following percentages of the value of the investment (including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid monthly from your client's account on approximately the last business day of the month. We will redeem units to this amount from your client's account and pay you/your dealer group accordingly. The payment will be made to the dealer group which will then pay you (the adviser), as per the instructions below. The ongoing adviser service fee will continue to be deducted from your client's account until they notify us of the contrary in writing.  Percentage (including GST)  Output (up to 1.10% p.a.) 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.10% p.a. 0.10% p.a. 0.00% p.a. 0.275% p.a. 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.10% p.a. 0.00% p.a. 0.275% p.a. 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.10% p.a. 0.00% p.a. 0.0110% p.a.) 0.00% p.a. 0.0275% p.a. 0.55% p.a. 0.775% p.a. 1.00% p.a. 1.00% p.a. 0.00% p.a. 0.0110% p.a.) 0.00% p.a. 1.10% p.a. 0.00% p.a. 0.0275% p.a. 0.00% p.a. 0	Your adviser is required to sign this section unless the adviser service fee is being reduced	to zero.
Percentage (including GST) <p< th=""><th>If you and your client have agreed an ongoing advicer service fee, please select one of the following</th><th></th></p<>	If you and your client have agreed an ongoing advicer service fee, please select one of the following	
<ul> <li>0.00% p.a.</li> <li>0.275% p.a.</li> <li>0.55% p.a.</li> <li>0.775% p.a.</li> <li>1.00% p.a.</li> <li>1.10% p.a.</li> <li>0ther (up to 1.10% p.a.)</li> <li>0</li> <li>rixed annual dollar amount (including GST)</li> <li>\$</li> <li>0.00</li> <li>The initial adviser service fee can be zero.</li> <li>Mark this box if you want us to index the fixed dollar amount by Average Weekly Ordinary Time Earnings (AWOTE) each 1 July. Percentage fees cannot be indexed.</li> </ul> ONGOING ADVISER SERVICE FEE SPLIT BETWEEN DEALER GROUP AND ADVISER* Please specify how you would like the ongoing adviser service fee to be split between the dealer group and adviser, ensuring that the two percentages or two fixed dollar amounts add up to the amount you have written above: Dealer group <ul> <li>.</li> <li>.</li></ul>	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser),	I monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi
Other (up to 1.10% p.a.)       Other (up to 1.10% p.a.)       Other (up to 1.10% p.a.)         OR       Fixed annual dollar amount (including GST)         Image: Strain of the initial adviser service fee can be zero.       Other (up to 1.10% p.a.)         Mark this box if you want us to index the fixed dollar amount by Average Weekly Ordinary Time Earnings (AWOTE) each 1 July. Percentage fees cannot be indexed.         OKGOING ADVISER SERVICE FEE SPLIT BETWEEN DEALER GROUP AND ADVISER*         Please specify how you would like the ongoing adviser service fee to be split between the dealer group and adviser, ensuring that the two percentages or two fixed dollar amounts add up to the amount you have written above:         Image: Dealer group Image: Im	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser),	I monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi
<ul> <li>Fixed annual dollar amount (including GST)</li> <li>\$</li></ul>	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the contr	I monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi
<ul> <li>\$</li></ul>	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the control Percentage (including GST) 0.00% p.a. 0.275% p.a. 0.55% p.a. 0.775% p.a. 1.00% p.a.	I monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi rary in writing.
<ul> <li>S</li></ul>	<ul> <li>(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the control</li> <li>Percentage (including GST)</li> <li>0.00% p.a.</li> <li>0.275% p.a.</li> <li>0.55% p.a.</li> <li>0.775% p.a.</li> <li>1.00% p.a.</li> <li>0.10% p.a.</li> <li>0.10% p.a.</li> </ul>	I monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi rary in writing.
1 July. Percentage fees cannot be indexed. ONGOING ADVISER SERVICE FEE SPLIT BETWEEN DEALER GROUP AND ADVISER* Please specify how you would like the ongoing adviser service fee to be split between the dealer group and adviser, ensuring that the two percentages or two fixed dollar amounts add up to the amount you have written above: Dealer group	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the control <b>Percentage (including GST) Percentage (including GST) 0.00%</b> p.a. <b>0.275%</b> p.a. <b>0.55%</b> p.a. <b>0.775%</b> p.a. <b>0.775%</b> p.a. <b>0.00%</b> p.a. <b>OR</b>	I monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi rary in writing.
Please specify how you would like the ongoing adviser service fee to be split between the dealer group and adviser, ensuring that the two percentages or two fixed dollar amounts add up to the amount you have written above:  Dealer group	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the control	I monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi rary in writing.
AND	<pre>(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the control Percentage (including GST)  </pre> <b>Percentage (including GST) Outher (up to 1.10% p.a.) Outher (up to 1.</b>	A monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi rary in writing.
	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the control <b>Percentage (including GST) Percentage (including GST) Description Description</b> <	A monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi rary in writing.
Adviser % p.a. OR \$00	(including GST) or nominate a fixed dollar amount per annum (including GST) which is to be paid approximately the last business day of the month. We will redeem units to this amount from your accordingly. The payment will be made to the dealer group which will then pay you (the adviser), service fee will continue to be deducted from your client's account until they notify us of the control.          Percentage (including GST) <ul> <li>0.00% p.a.</li> <li>0.275% p.a.</li> <li>0.55% p.a.</li> <li>0.775% p.a.</li> <li>1.00% p.a.</li> <li>0.075% p.a.</li> <li>0.775% p.a.</li> <li>0.00% p.a.</li> <li>0.275% p.a.</li> <li>0.775% p.a.</li> <li>0.00% p.a.</li> <li>0.00% p.a.</li> <li>0.00% p.a.</li> <li>0.00% p.a.</li> <li>0.00% p.a.</li> <li>0.01% p.a.</li> <li>0.00% p.a.</li> <li>0.00</li> <li>The initial adviser service fee can be zero.</li> <li>Mark this box if you want us to index the fixed dollar amount by Average Weekly 1 July. Percentage fees cannot be indexed.</li> </ul> <li>ONGOING ADVISER SERVICE FEE SPLIT BETWEEN DEALER GROUP AND ADVISER*</li> <li>Please specify how you would like the ongoing adviser service fee to be split between the dealer of percentages or two fixed dollar amounts add up to the amount you have written above:</li> <li>Dealer group</li> <li></li>	A monthly from your client's account on client's account and pay you/your dealer group as per the instructions below. The ongoing advi rary in writing. a. 1.10% p.a. Ordinary Time Earnings (AWOTE) each

\* Where an adviser is a representative of a dealer group whose details appear on this Application Form, you are required to advise us of the payment split between the dealer group and adviser. This is a new requirement under the Future of Financial Advice legislation.

Page 2 of 3

2. Adviser	service fee (continued)						
c. PLEASE MARK ONE OPTION ONLY AND COMPLETE THE RELEVANT DETAILS: Option 1 - Authorised representatives of licensed dealer groups							
Ð	I declare that I am authorised to sign on behalf of the licensed dealer group. On behalf of the dealer group I acknowledge and agree that the Trustee may cease or vary the advisory service fee if so notified by the applicant. The dealer group and I are neither the agents nor partners of the Trustee or a company in the Russell Investment Group.	SIGNATURE OF THE ADVISER					
OR Option 2 - Licensed financial advisers							
Ð	I declare that I am a licensed financial adviser and do not represent a dealer group, and I acknowledge and agree that the Trustee may cease or vary the adviser service fee if so notified by the applicant. I am not an agent nor a partner of the Trustee or a company in the Russell Investment Group.	SIGNATURE OF THE ADVISER					
Mark	IAL INSTRUCTIONS         his box if you want us to index the fixed dollar amount by Average Weekly Ordinary         utage fees cannot be indexed.         STAMP         Adviser stamp	y Earnings (AWOTE) each 1 July.					
3 Authori	antion .						

If you have a financial adviser it is important that you consult them prior to effecting changes to your account. If you have consulted your adviser

regarding this change or you would like to proceed with this request without speaking with your adviser please sign, date and return this form to us. I request that the Trustee redeem units from my account each month to pay my nominated financial adviser the ongoing adviser service fee

I have selected on this form and direct the Trustee to pay the proceeds of this redemption from my Cash Holding Account to my nominated financial adviser.

If signed under Power of Attorney, the attorney verifies that no notice of revocation of power has been received.

Investor signature	Date of birth (dd/mm/yyyy)	
Investor name (print)		
Investor number	Date (dd/mm/yyyy)	

Page 3 of 3

Please return this form to Russell Private Active Pension, Locked Bag A4094 Sydney South NSW 1235