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Vanguard® Investor Funds

Vanguard

Financial adviser access

Use this form if you are a Vanguard investor and would like to add, remove or change a financial adviser from having access to your Vanguard portfolio information.

Important: A financial adviser can only be added to your account after they have registered for Vanguard Online. If you have changed financial advisers, please fill out both sections 2 and 3 of the form.

Important: Print in CAPITAL LETTERS.
If you need other forms, please go to: https://www.vanguard.com.au/personal/en/forms-and-notices

Questions?

Call 1300 655 101 (Australia)

Call (+61) 3 8888 3888 (Overseas)

The Vanguard Personal Investor team is available from 8am to 6pm Monday to Friday (Melbourne time)

1. Account details (must be completed)

Account number	Contact phone number(s)
	( )
Investor name	

2. Adding a financial adviser

Please provide the below details of the financial adviser you wish to give access to your information.
All advisers registered with Vanguard will have an adviser number.

Vanguard Adviser number (Required)
Australian Financial Services Licence number
Adviser name
Business name

Monitoring of your portfolio by your adviser
We may share your investment information such as investor name, fund name, transactions and portfolio holdings with data aggregators to make it easier for your adviser to monitor your portfolio and provide you with ongoing advice.

3. Removing a financial adviser

☐ I am no longer advised by the financial adviser on record.

4. Declaration (must be completed)

Please provide the required authorised signatures to validate this instruction in line with your account signing authority on file.

Authorised signatory 1	Authorised signatory 2
Signature	Signature
Name	Name
Date	Date
Position (please select one)	Position (please select one)
☐ Investor ☐ Director ☐ Trustee	☐ Investor ☐ Director ☐ Trustee
☐ Other ______	☐ Other ______

What's next?

You can return your completed form by sending us a scanned copy from the 'Message Us' section within Vanguard Online or by mail. To avoid duplication, please do not post this form if you have previously submitted it to us.

Mailing address:

Vanguard Personal Investor
GPO Box 1837
Melbourne, VIC 3001