

Authorisation to provide account information

Complete this form to allow Vanguard to provide information about your Vanguard Personal Investor Account to the business representative you nominate. This could be a financial adviser, solicitor, accountant or other third-party business representative.

By completing this form, you're authorising the nominated business representative to have access to information about your Vanguard Personal Investor Account. This business representative will only receive information about your account – they will not be able to make changes or undertake any actions in your account on your behalf. You can also use this form to remove a third-party authority.



Important: Authorisation is valid for two years from the date this form is signed.

Please ensure that you provide a copy of this signed form to your nominated representative as a copy of the signed form is required to be provided to Vanguard with each request for information about your Vanguard Personal Investor Account.



Questions?

Call 1300 655 101 (Australia)

Call (+61) 3 8888 3888 (Overseas)

Vanguard Client Services are available from 8am to 6pm Monday to Friday (Melbourne time)

Please complete this form in blue or black pen using **CAPITAL** letters.

Section 1. Account details (must be completed)

Account number <input type="text"/>	Contact phone number <input type="text"/>
Investor name <input type="text"/>	

Need help?

Call us on 1300 655 101 or visit www.vanguard.com.au.

Vanguard Investments Australia Ltd (ABN 72 072 881 086 AFS Licence 227263).

Section 2. Nominated business representative (must be completed)

Full name of representative	
<input type="text"/>	
Relationship/role (i.e. your financial adviser, solicitor, accountant)	Company name (if applicable)
<input type="text"/>	<input type="text"/>
Postal address	
<input type="text"/>	
Email address	
<input type="text"/>	
Business hours phone number	Mobile phone number
<input type="text"/>	<input type="text"/>

Practicing staff details

Name	Email
<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"/>

Section 3. Remove nominated business representative

<input type="checkbox"/> I/We wish to remove this representative.	
Full name of representative	
<input type="text"/>	
Relationship/role (i.e. your financial adviser, solicitor, accountant)	Company name (if applicable)
<input type="text"/>	<input type="text"/>

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Vanguard Personal Investor authorisation to provide account information form

Section 4. Declaration (must be completed)

By signing this form you are confirming that you are authorised to provide us with these instructions and you declare that:

- I/ We authorise Vanguard to provide the nominated business representative(s) above with information about my Vanguard Personal Investor account or authorise Vanguard to remove the representative previously nominated to receive information about my Vanguard Personal Investor Account;
- I/We understand that Vanguard Personal Investor may do some checks to confirm the identity of the representative nominated above prior to disclosing any information;
- I/We understand that this authority will remain in effect for two years from the date this form is signed; and
- I/ We understand that the latest version of the Vanguard Privacy Policy and Privacy Collection Statement is available online at <https://www.vanguard.com.au/personal/en/privacy>.

Authorised signatory 1	Authorised signatory 2
<p>Signature</p> <p>X</p>	<p>Signature</p> <p>X</p>
<p>Name</p> <p></p>	<p>Name</p> <p></p>
<p>Date (DD/MM/YYYY)</p> <p></p>	<p>Date (DD/MM/YYYY)</p> <p></p>
<p>Position (please select one)</p> <p><input type="checkbox"/> Investor <input type="checkbox"/> Director <input type="checkbox"/> Trustee</p> <p>Other (please specify)</p> <p></p>	<p>Position (please select one)</p> <p><input type="checkbox"/> Investor <input type="checkbox"/> Director <input type="checkbox"/> Trustee</p> <p>Other (please specify)</p> <p></p>

What's next?



Email

Please submit the completed form to thirdpartycontact@vanguard.com.au



Important: A valid copy of this signed form must be provided to Vanguard with each request for account information by the nominated business representative.

Vanguard Investments Australia Ltd (ABN 72 072 881 086 / AFS Licence 227263) is the product issuer and the Operator of Vanguard Personal Investor. We have not taken your circumstances into account when preparing the above information so it may not be applicable to your circumstances. You should consider your circumstances and the Vanguard Personal Investor – Investor Guide and Product Disclosure Statements (PDSs) before making any investment decision. Distributors of our products must consider our Target Market Determinations (“TMDs”) which describe the investors for whom the product would likely be appropriate and consistent with their objectives, financial situation and needs. You can access our Investor Guide, PDSs and TMDs online at www.vanguard.com.au or by calling us on 1300 655 101. Past performance is not an indication of future performance. This publication was prepared in good faith and we accept no liability for any errors and omissions.
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