

Authorised representative form

Use this form if you wish to appoint another person with the required legal capacity to act as your authorised representative and to operate your Vanguard Personal Investor Account on your behalf. This form also allows you to cancel an appointment at any time.



Important: This form is only for investors who directly hold a Vanguard Personal Investor Account. Financial advisers are not eligible to use this form to act as your authorised representative. If you are unsure in what capacity you hold your Vanguard Personal Investor Account, please contact us.

If you need other forms, please go to:
<https://www.vanguard.com.au/personal/support/idps-forms>



Questions?

Call 1300 655 101 (Australia) or (+61) 3 8888 3888 (Overseas). Vanguard Client Services are available from 8am to 6pm Monday to Friday (Melbourne time)

Please select the relevant details you wish to change

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> Appoint authorised representative | Complete section 1, 2 & 4 |
| <input type="checkbox"/> Remove authorised representative | Complete section 1, 3 & 4 |

Section 1. Account details (must be completed)

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

Section 2. Authorised representative details

We require the below details of the individual you would like to nominate as an authorised representative. All fields are mandatory.

Important: Please ensure the authorised representative provides a certified true copy of identification to support full name, date of birth, residential address and signature.

Note: Each person must have a unique Australian mobile number and email address.

Investor number (if applicable) <input type="text"/>			
Title <input type="text"/>	First name <input type="text"/>	Middle name <input type="text"/>	Surname <input type="text"/>
Relationship to account holder (e.g. Parent) <input type="text"/>	Occupation <input type="text"/>	Date of birth (DD/MM/YYYY) <input type="text"/>	
Email address (required for Vanguard Online Registration) <input type="text"/>			Mobile phone <input type="text"/>

Full registered address (must not be a PO Box)

Address <input type="text"/>			
Suburb <input type="text"/>	State <input type="text"/>	Postcode <input type="text"/>	Country <input type="text"/>

Section 3. Remove authorised representative details

If you would like to remove an authorised representative from your account, please complete the details below. Once completed, proceed to section 4.

Authorised representative full name <input type="text"/>
<input type="checkbox"/> I/We no longer wish to appoint the individual nominated above as an authorised representative.

Section 4. Declaration (must be completed)



I/we are authorised to provide the following instructions and authorise the account to be updated.

- I/We authorise the above named person(s) in Section 2 to act on my/our behalf to operate my/our investment with Vanguard. The authorised person(s) will have full access to transact on our account, except to:
 - appoint another authorised representative to act on my/our behalf; or
 - change my/our personal details.
- I/We acknowledge and agree to be responsible for the actions of the authorised representative(s).
- I/We agree that the information supplied is covered by Vanguard's Privacy Policy (available at www.vanguard.com.au) and sets out how Vanguard Investments Australia Ltd may collect, use and disclose the information supplied by me/us.
- I/We also release, discharge and agree to indemnify Vanguard for any losses, liabilities, actions, proceedings, ac-counts, claims and demands in respect of any liabilities arising out of this appointment.
- This arrangement will continue until I/we terminate it by submitting this form via Vanguard Online secure message. This termination will take effect from the date of receipt by Vanguard. In circumstances where we receive the termination after 1:00pm AET, Vanguard reserves the right to process this authority on the next business day.
- I/We are aware that I/we are responsible for the actions of the authorised representative(s).

Signatory 1

Signatory 2

Signature (must sign in wet ink)



Signature (must sign in wet ink)



Name

Name

Date (DD/MM/YYYY)

Date (DD/MM/YYYY)



Before you submit

Checklist

Before you submit your application, please ensure:

- You have attached true certified copies of the authorised representative's identification specified in section 2 'Authorised representative details'.
- You have ticked the declaration box in section 4 'Declaration'.
The existing signatories have signed and dated section 4 'Signatures'.

Certification requirements

Important: When having copies of documents certified you should show both the original document and a copy to the eligible certifier. Please refer to our certification guide https://fund-docs.vanguard.com/AU-Vanguard_Certification_guide.pdf

How to submit your application



We can only accept the account owner to submit the completed form and any attachments via secure message through **Vanguard Online** or by mail. Once we have processed your request, both you and your authorised representative will receive a confirmation email. 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

Vanguard is committed to respecting the privacy of your personal information. For information about Vanguard's approach to managing your personal information, please view our Privacy Policy at <https://www.vanguard.com.au/personal/en/privacy>

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