

Non-advised collection form for new individuals (POAs, Directors, Trustees)

This form is only to be used by non-advised clients to collect essential information for any new individuals who are acting as a Power of Attorney (POA), director, trustee, beneficial owner, etc. on their CFS Edge account(s).

If the new individual has an existing CFS Edge account, this form is not required to be completed. Instead, please submit their certified ID along with the required supporting documentation via the Document Library.

Prior to submitting this form, please ensure you have filled out all the necessary sections and signed and dated the declaration. All fields are required to be completed to ensure we hold the correct details.

Please upload the completed form to the Document Library via CFS Edge. For assistance please call 1300 769 619.

Section 1: Your details

This se	ection mus	st be comp	pleted by th	e new individ	ual unless th	ne individual ha	as an existing CFS	Edge account.
Title	Mr	Mrs	Miss	Ms (Other			
Given r	name(s)							
Surnan	ne							
Date of birth			Gender	Male	Female	Prefer not to s	ay	
Cont	act det	ails						
Mobile number			Email ac	Email address				
Reside	ntial addre	ess						
Unit number		Street numbe		Street name				
Suburb							State	Postcode
Country								
Postal	address (i	if different	to resident	ial address)				
Unit number		Street numbe		PO Box		Street name		
Suburb							State	Postcode
Country								

Tax and regulatory details

Occupation¹

Source of funds²

Source of wealth²

If your primary country of citizenship is not Australia, please specify which country is your primary country of citizenship:

Please provide your domestic and international tax residency information:

Country of tax residency	Primary tax residency		Tax reference number OR Exemption reason	
	Yes	No		

A tax reference number is the number assigned by each country for the purposes of administering tax laws. This is the equivalent of a Tax File Number in Australia or a Social Security Number in the US. If a tax reference number is not provided, please list one of the three exemption reasons (A, B or C) for not providing a tax reference number.

- Reason A The country of tax residency does not issue tax reference numbers to tax residents.
- Reason B The individual has not been issued with a tax reference number.
- Reason C The country of tax residency does not require the tax reference number to be disclosed.

Country of birth

If you were born in the United States, please also provide your city of birth

Section 2: CFS Edge Account details

Please list the account name and number of all CFS Edge account(s) you need to be linked to.

Account number(s)	Account name(s)	

¹ When providing your occupation, please refer to the What is my occupation/industry? information which can be accessed online at cfs.com.au/personal/resources/fags/your-account/occupation

² When providing your source of funds and source of wealth, please refer to the Source of funds and source of wealth information which can be accessed online at cfs.com.au/cfsedge/source-of-funds-and-source-of-wealth

Section 3: Declaration and signature

As the individual noted in Section 1, I authorise and declare;

- all details in this form are true and correct.
- I consent to my information being used in accordance with the CFS privacy policy which can be accessed online at cfs.com.au/privacy
- that I have added my US tax residency details if I am a US resident for tax purposes in order to be in compliance with Foreign Account Tax Compliance Act (FATCA)
- that I have added the tax residency details for the countries that I am a tax resident of in order to be in compliance with the Common Reporting Standards (CRS)
- I have read and understood the relevant Product Disclosure Statement (PDS) and/or Investor Directed Portfolio Service (IDPS) Guide for these product(s)
- I understand that I/we can seek financial advice to implement an investment strategy that suits my/our individual goals and objectives by taking into account the likely return, the level of risk and investment time frame; and
- if this form is signed under Power of Attorney, I/we have not received notice of revocation of the power.

Signature	Name
	Date

Section 4: Documents to provide

We require personal/identity documents for any new individual. Detailed information on how to provide this documentation is outlined below.

Additional documentation to support your request will also be required and this varies based on your situation. Please contact us on 1300 769 619 and our team will provide a comprehensive list of all documents to provide with your request.

Personal/Identity Documents

Certified copy of one of the following identification documents for the new individual:

- Current Australian driver's licence
- Current passport (Australian passports can have expired in the last 2 years)
- Current Proof of Age card

OR

Certified copy of one of the following for the new individual:

- · Birth certificate or birth extract
- Citizenship certificate issued by the Australian Government
- Pension card issued in your name by the Department of Human Services that entitles you to a financial benefit

AND one of the following:

- Department of Human Services that shows a provided to you (issued within the last 12 months)
- ATO notice of assessment (issued within the last 12 months)
- Local council rates notice (issued within the last three months)
- Electricity or gas notice (issued within the last three months)

Instructions for certification

Who can certify documents?

In Australia, the following people can certify your documents:

- Architect, chiropractor, dentist, legal practitioner, medical practitioner, midwife, nurse, occupational
 therapist, optometrist, patent attorney, pharmacist, physiotherapist, psychologist, trademarks attorney,
 veterinary surgeon, Justice of the Peace, police officer, magistrate or judge, notary public.
- Your financial adviser (provided they have two or more years of continuous service).
- Your accountant (provided they hold a current membership to a professional accounting body).
- An officer of a bank, building society, credit union or finance company provided they have two or more years of continuous service.
- Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955 (Cth)).

What should your certified personal/identity document(s) look like?

After the certifier is satisfied the copy is a true copy, they will:

- · write or stamp 'True copy of the original document' on every page
- · sign and date the document
- · write their name and qualification
- apply a registration number (if applicable to their certifying authority, e.g. Justice of the Peace, reg #123456, CPA #123456), and/or company/employer name; and
- apply a stamp (if applicable to their certifying authority).

Avanteos Investments Limited ABN 20 096 259 979, AFSL 245531 (AIL) is the trustee of the 'Avanteos Superannuation Trust' ABN 38 876 896 681 and issuer of CFS Edge Super and Pension. Colonial First State Investments Limited ABN 98 002 348 352, AFSL 232468 (CFSIL) is the Investor Directed Portfolio Service operator, administrator and custodian of 'Avanteos Wrap Account Service' which include CFS Edge Investments. 30088/FS8353/0824