

The Trustee

will only accept this form if it is correctly and fully completed.

Any questions, call
Member Services 1300 131 227

Please complete this form if you have appointed an FCA regulated Financial Adviser who is going to receive an adviser charge for the transfer advice in relation to your Safeguarded benefits.

Please complete this form in BLOCK LETTERS, in black ink and return it to (email and post): Email scan to info@aesf.com.au

Post original to AESF, 41A Mount Barker Road, Hahndorf SA 5245, Australia

1. Financial Adviser details and adviser charges

Company name

Network name

Financial Adviser name

FCA firm reference number

Address

Email

Telephone

PLEASE NOTE: Your Financial Adviser will need to sign up to our Financial Adviser Terms of Business.
Please email info@aesf.com.au or call +61 8 8188 1159 to request a copy.

2. Adviser charges: one off charge

If the Financial Adviser intends to charge a one off amount for the transfer advice, please indicate the amount that is required below. We will make this payment automatically when sufficient funds are available.

One off charge amount

£

3. Declaration

I authorise the Australian Expatriate Superannuation Fund to pay adviser charges to my Financial Adviser as detailed in this form.

Applicant's name

Applicant's signature

Date [dd/mm/yy]

Notes to Financial Adviser

Adviser charges will be paid to the bank account detailed on the Financial Adviser Receipt Created Tax Invoice Agreement.

4. Applicant details

Applicant's name

Name of transferring scheme

Transferring scheme's policy number

5. Declaration

I confirm in respect of the proposed transfer from the above named transferring scheme that:

- This transfer contains safeguarded benefits, as defined by the FCA

 Yes No

- I have provided the above named applicant with advice in respect of this transfer

 Yes No

- I am qualified to provide financial advice in respect of pension transfers, as defined by the FCA, and my firm has the appropriate FCA permissions to provide advice on pensions transfers and opt outs.

 Yes No

Financial adviser's signature

Date [dd/mm/yy]