

Dealer Information Form

Australian Unity Select Income Fund ARSN 091 886 789

Please use **BLOCK** letters and a black or blue pen to complete this form

Please indicate using an **X** where appropriate. If a section does not apply to you, please indicate using **N/A**.

Step 1 Dealer details

Advisor group/ Dealer name	<input type="text"/>		
Trading as	<input type="text"/>		
Contact name	<input type="text"/>		
Mailing name (if different to trading name)	<input type="text"/>		
Unit	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Street number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
		PO Box	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Street name	<input type="text"/>		
Suburb	<input type="text"/>		
Postcode	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Country	<input type="text"/>
Business telephone	<input type="text"/>	Business fax	<input type="text"/>
Mobile phone	<input type="text"/>		
Email	<input type="text"/>		
Preferred contact method	<input type="checkbox"/> Phone <input type="checkbox"/> Email		
Email (payment address)	<input type="text"/>		

Tip: dealers may find it useful to have one central email address for payment correspondence, for example admin@xydealer.com.au

Additional Commission Report preferred format: ☐ Excel file ☐ CSV file

Step 2 Account details

Bank account name	<input type="text"/>		
Bank name	<input type="text"/>		
	<input type="text"/>		
BSB number	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/>	Account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Step 3 Tax details

ABN	<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"/>	GST registered	<input type="checkbox"/> Yes <input type="checkbox"/> No
AFSL number	<input type="text"/>		
	<input type="text"/>		
Registraton state	<input type="text"/> <input type="text"/> <input type="text"/>		

Step 4 Website Access User Request (Portal)

User 1

User 1 full name	<input type="text"/>
User 1 email address	<input type="text"/>
User 1 position title	<input type="text"/>
User 1 business phone	<input type="text"/>

User 2

User 2 full name	<input type="text"/>
User 2 email address	<input type="text"/>
User 2 position title	<input type="text"/>
User 2 business phone	<input type="text"/>

User 3

User 3 full name	<input type="text"/>
User 3 email address	<input type="text"/>
User 3 position title	<input type="text"/>
User 3 business phone	<input type="text"/>

Step 5 Declaration and Signature(s)

Company Authorised signatory

<input type="text" value="X"/>

Name of signatory

<input type="text"/>
<input type="text"/>

Position of signatory

<input type="text"/>
<input type="text"/>

Date / /

Authorised signatory

<input type="text" value="X"/>

Name of signatory

<input type="text"/>
<input type="text"/>

Position of signatory

<input type="text"/>
<input type="text"/>

Date / /



Return by post

Send completed form together with relevant identification documents.

Within Australia

Australian Unity Select Income Fund
Reply Paid 91914
MELBOURNE VIC 3000
(No stamp required if mailed
within Australia)

Outside Australia

Australian Unity Select Income Fund
271 Spring Street
MELBOURNE VIC 3000



Email

selectincomefund@australianunity.com.au

Contact us

Investor Services
1300 412 356
australianunity.com.au/wealth/sif