



Adviser Electronic Transaction Authority Form

Instructions:

Please indicate below which of your KeyInvest policies this Adviser authority applies to;

Please apply this Adviser authority to ALL of my KeyInvest policies

Please ONLY apply this Adviser authority to this application

Use this form to authorise the financial adviser nominated in this form and any other person authorised by them under the same dealer group to apply for and submit online applications and obtain details of your policies on your behalf. This form is to be retained by the financial adviser and a copy uploaded to KeyInvest in the online application portal or by emailing to info@keyinvest.com.au

1. Policy Holder(s) Details

Policy Owner 1

Full Name

Email

Date of Birth

Company ABN

Unit Number

Street No

Street Name

Suburb

State

Postcode

Country

Policy Owner 2

Full Name

Email

Date of Birth

Company ABN

Unit Number

Street No

Street Name

Suburb

State

Postcode

Country

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2. Financial Adviser To Be Appointed

Full Name

Licensee Dealer Group

Licensee Dealer Group AFSL No.

KeyInvest Adviser Code (if known)

Please note: The above named adviser will be able to lodge online applications on your behalf and obtain all policy information. This authority is subject to the terms and conditions in Sections 4 and 5.

3. Additional Transactions To Be Authorised

By completing the section you authorise the following additional transactions:

Switches

Change of address, phone numbers and emails.

4. Financial Adviser Declaration

This must be signed by the financial adviser noted in Section 2.

By completing this form, you accept and agree to:

- Be bound by the terms and conditions contained in this form.
- Only provide instructions to KeyInvest that have been discussed and agreed to by the policy owner(s).
- Inform KeyInvest immediately you cease to be licensed by the Dealer Group or cease to have a relationship with the policy owner(s).
- Notify KeyInvest immediately of any dispute with the policy owner(s) in relation to any instruction provided to KeyInvest under this authority.

Signature of Financial Adviser

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5. Policy Owner(s) Declaration

By signing this declaration, you nominate the named Financial Adviser and any other person authorised by that adviser (authorised delegate), to have details of your policies and to perform the activities for the policies nominated in this form.

Please note that by appointing a Financial Adviser to transact on your behalf, you are giving that Financial Adviser, and any authorised delegate, authority to transact and modify details for your policies, until we receive a valid written notification, signed by you, amending or revoking this authority. As your Financial Adviser may delegate this authority to third parties, such as others in their office, you should carefully consider the implications of giving this authority prior to proceeding.

By signing this Adviser Transaction Authority Form you acknowledge that:

You authorise the nominated Financial Adviser, or authorised delegate:

- to apply for and submit online applications
- if KeyInvest reasonably believes that a person is your authorised Financial Adviser, or authorised delegate, then:
 - anything they do on your behalf within the constraints of this agreement will be treated as if you had done it personally
 - KeyInvest will not accept or be on notice of any restrictions on their authority and therefore all instructions provided by your Financial Advisor or authorised delegate under this authority will be taken to be authorised by you
 - the named Financial Adviser will remain authorised, even if this Financial Adviser changes to a new dealer group (with the current dealer group's release authority)
- if the Australian Financial Services Licence of the Financial Adviser's dealer group is suspended or cancelled by the Australian Securities Investment Commission, KeyInvest may switch off the authority
- once you sign this authority we will treat your Financial Adviser, or authorised delegate, as being properly appointed unless you inform us otherwise
- the selections you have made in section 3 of this Authority allows your Financial Adviser to make switches and/or change addresses, phone numbers and emails.
- your Financial Adviser cannot make a withdrawal (unless the payment is made into an account nominated by you), transfer the ownership of your investment to anyone else, or change your banking arrangements. They also cannot change CAO arrangements including the vesting date, change KeyPlanner transfer arrangements, or change or add Beneficiaries or lives insured unless expressly authorised by you
- your Financial Adviser cannot appoint another representative.

You agree to release, discharge and indemnify KeyInvest from and against any liability, cost or loss that is incurred by KeyInvest or you as a result of KeyInvest acting on this authority, except if KeyInvest has acted fraudulently or has wilfully defaulted in our obligations to you and you acknowledge that we will process transactions under this authority until we receive a valid written notification signed by you, amending or revoking this authority.

This authority continues until we receive written notice from you of cancellation of the authority.

KeyInvest may refuse to accept an authority or permit a person to transact or carry out a transaction under this agreement.

KeyInvest may cancel or vary these conditions by giving you not less than seven days written notice.

Signature of Policy Owner 1

Date

Signature of Policy Owner 2

Date

Please return this form to KeyInvest Ltd, PO Box 3340, Rundle Mall SA 5000 or by email to info@keyinvest.com.au or upload via the online Funeral Bond or Life Events Bond application page.