



# BWA Managed Investments – Adviser Nomination Form

Please complete this form to either add or amend a nominated adviser and/or provide authority to disclose your personal/account information.

## 1. INVESTOR DETAILS

Account number 1

Account number 2

Account name

Account name

## 2. ADVISER NOMINATION

**By crossing (X) this box and signing this form, I/we:**

- declare that I/we have read the current Product Information Statement (PIS) for the BWA Cash Management Account (BWA CMA)
- authorise the adviser nominated in section 6 of this form to be the servicing adviser for my/our BWA CMA identified in section 1 of this form
- authorise Colonial First State to provide my/our nominated adviser with access to my/our BWA CMA based on the access level nominated in section 3 of this form
- understand that my/our nominated adviser may have applicable fee and commission rights as detailed in the PIS
- remain bound by the terms and conditions contained in the PIS (as updated from time to time)
- understand that as a consequence of this authorisation, if applicable:
  - any existing adviser nominations on my/our BWA CMA will be replaced by this nomination
  - any existing Adviser/Broker Service Fee arrangements negotiated with any previous adviser will be carried over to the adviser I/we have nominated in section 6 of this form and will continue to be paid from my/our BWA CMA (unless Colonial First State is notified in writing to cease such Adviser/Broker Service Fee payments from my/our account(s))
- agree this adviser nomination will continue to operate until I/we notify Colonial First State in writing that the adviser nominated in section 6 of this form is no longer my/our servicing adviser.

## 3. ADVISER ACCESS

The adviser nominated in section 6 of this form is to have:

- Enquiry Access
- Fee Access
- General Withdrawal Authority

## 4. AUTHORITY TO DISCLOSE INFORMATION

I/We, the Account Holder/s of the above nominated account/s (accounts) authorise Colonial First State to disclose current and historical account and transactional (including account balance) details (data) in relation to the Accounts by electronic file to the Data Feed Provider (provider) outlined by me/us below:

Data Feed Provider

- BGL
- Class Super
- Praemium
- Xplan
- Australian Money Markets
- Multiport

Other

(Please note that multiple providers can be nominated)

I/We understand and agree that:

- the provider will then make the data available to the advisers and administrators nominated by me/us to view the accounts;
- no agency, partnership, joint venture or any other type of similar relationship exists between Colonial First State and the provider;
- Colonial First State is not liable for any loss or damage which may be suffered or incurred, or which may arise, directly or indirectly, as a result of acting in accordance with this Authority;
- neither Colonial First State or the provider will, subject to any prohibition or limitation imposed by law, be liable for delays, non-performance, failure to perform, processing errors or any other matter arising out of this agreement;
- this agreement is to be read together with the relevant Bankwest terms and conditions that govern the accounts, however, to the extent of any inconsistency these terms will prevail;
- Colonial First State will not be liable to any person for their reliance on any data supplied to the provider or any failure of Colonial First State to provide information or to provide complete or accurate data to the provider;
- Colonial First State may decide at its sole discretion, on any ground it thinks fit and, without rendering Colonial First State or the provider liable in any way, to discontinue the provision of data to the provider pursuant to this authority by written notice to the provider; and
- we may terminate this agreement on providing 2 business days written notice to Colonial First State at the address above.

This authority is only valid from the date it is received by Colonial First State and signed by the account holders.

All Authorised signatories must sign this form for your instructions to be executed.

## 5. SIGNATURES

By signing this form, I/we declare all details in this form are true and correct and I/we indemnify Colonial First State against any liabilities whatsoever arising in connection with:

- processing this adviser nomination
- providing the adviser nominated in section 6 of this form with details of my investments for each BWA CMA account(s) identified in section 1 of this form
- providing details of my BWA CMA account(s) identified in section 1 to Data Feed Provider(s) nominated in section 4.

### Signature of investor 1

Print name here

Date

### Signature of investor 2

Print name here

Date

If this form is signed under a Power of Attorney, the Attorney declares that he/she has not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this application unless we have already sighted it). The Attorney will also need to complete a identification form (Individual) which can be obtained from our forms library at [bwami.com.au/forms/cma-forms](http://bwami.com.au/forms/cma-forms) or by calling our Client Services Team on 1300 663 117.

## 6. ADVISER DETAILS (ADVISER USE ONLY)

Adviser name

Contact phone number

Email address

Adviser Code

Dealer/Adviser stamp

Please contact us to obtain an adviser code if you have not been issued with one.

By providing your (adviser) details, you:

- certify that you are appropriately authorised to provide financial services in relation to the BWA CMA identified in section 1 of this form
- confirm that where any Adviser/Broker Service Fees are paid from an investor(s) BWA CMA to you, these fees:
  - have been agreed with the investor(s)
  - are of a reasonable amount for the financial advice provided and you acknowledge that:
    - Colonial First State has the discretion to decline a request to pay this adviser service fee in order to comply with its obligations under law.

If you need help completing this form please contact our Client Services Team

Client Services: 1300 663 117  
Email: [support@bwami.com.au](mailto:support@bwami.com.au)  
Fax: 1300 853 628

Bankwest, a division of Commonwealth Bank of Australia ABN 48 123 123 124 AFSL/Australian credit licence 234945, the issuer of the BWA Cash Management Account (BWA CMA) has appointed Colonial First State Investments Limited (CFSIL), ABN 98 002 348 352/AFSL 232468 as the administrator and distributor of the BWA CMA. BWA Managed Investments is a specialist cash management business and forms part of CFSIL.