

Advisers can use this form to certify an applicant is a wholesale client and so able to invest.

Adviser's details

Title <i>Mr/Mrs/Ms/Miss</i>				First name			
Surname							
Street number			Street name				
Suburb							
State			Postcode			Country	
Work hours phone				After hours phone			
Mobile				Fax			
Email							
Dealer name							
Dealer AFSL number							

Investor name

write here the name of the investor in the trust, for example "XYZ Pty Limited as trustee for the XYZ Super Fund".

Investor name			

Investor's signature(s)		Date	
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By signing above the investor acknowledges that before investing they:

- have not been given a product disclosure statement nor any other document that would be required to be given to the client under the relevant chapter of the Corporations Act if interests in the relevant trust were provided to the client as a retail client and
- we have no other obligation to the them under the relevant chapter of the Corporations Act that we or they would have if the relevant trust was provided to the client as a retail client.

Adviser certification

As the holder of an AFSL or on behalf of the licensee identified above, I certify that I am satisfied on reasonable grounds that the applicant has previous experience in using financial services and investing in financial products that allows the applicant to assess:

- the merits of the Trust
- the value of the interests in the Trust
- the risks associated with holding interests in the Trust
- the applicant's own information needs and
- the adequacy of the information given by us and (if different) the product issuer,

I confirm that the applicant has been given a written statement of my reasons for being so satisfied.

Adviser's signature(s)		Date	
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