

ADVANCE ALLIANCE INVESTMENT FUNDS ADVANCE INVESTMENT FUNDS

How you can transact with us

There's a range of ways you can get in touch with us.

WHAT WOULD YOU LIKE TO DO?	FORM	ONLINE	PHONE	LETTER	FAX	EMAIL
TRANSACTION						
1. Make an initial application	✓ Application form	✗	✗	✗	✗	✗
2. Make an additional investment	✓ Additional investment application form	✓	✗	✓	✗	✗
3. Switch funds	✓ Switch request form	✓	✓	✓	✓	✗
4. Make a redemption (partial or full)	✓ Withdrawal request form	✓	✓*	✓	✓ (new bank account details can't be provided by fax)	✗
5. Transfer into or out of a fund	✓ Australian Standard Transfer form	✗	✗	✗	✗	✗
CHANGE DETAILS						
6. Change your name	✓ Account amendment form (with additional certified documentation)	✗	✗	✓	✗	✗
7. Change your address/contact details	✓ Account amendment form	✓	✓	✓	✓	✗
8. Change your bank account details	✓ Account amendment form	✓	✗	✓	✗	✗
9. Change your Regular Savings Plan	✓ Direct Debit and Regular Savings Plan request form	✓	✓ (new bank account details can't be provided by phone)	✓	✓ (new bank account details can't be provided by fax)	✗
10. Change your Regular Withdrawal Plan	✓ Regular Withdrawal Plan request form	✓	✓ (new bank account details can't be provided by phone)	✓	✓ (new bank account details can't be provided by fax)	✗

*Subject to conditions.

WHAT WOULD YOU LIKE TO DO?	FORM	ONLINE	PHONE	LETTER	FAX	EMAIL
11. Amend distribution options	✓ Account amendment form	✓	✓ (new bank account details can't be provided by phone)	✓	✗	✓ (new bank account details can't be provided by email)
12. Establish bank account details for a direct debit	✓ Direct Debit and Regular Savings Plan request form	✓	✗	✗	✗	✗
13. Make a change of signatories	✗	✗	✗	✓	✗	✗
14. Provide Tax File Number/ABN details	✓ Account amendment form	✓	✓	✓	✓	✗
15. Add or change your adviser	✓ Bulk investor transfer form or Single investor transfer form	✗	✗	✓	✓	✗
16. Remove an adviser	✗	✗	✗	✓	✓	✓
17. Change your adviser remuneration/ongoing commission	✓ Account amendment form	✓	✗	✓	✓	✗

Advance Asset Management, GPO Box B87, Perth WA 6838

Contact Centre 1800 819 935 Adviser Services 1300 361 864 Fax (02) 9274 5211

advance.com.au

ADVANCE
ASSET MANAGEMENT

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