

Change of details for individual and joint accounts

Information sheet

When to use this form

Use this form if you wish to change your name, address, or contact details.

You may also change your address and contact details online on northonline.com.au.

Change of details options

The information below will assist you when completing this form.

Your current details

Complete your full name, address and contact details in this section.

Change of address

Complete your new residential address and postal address if different.

Change of contact details

Complete your new contact numbers and email address.

Change of name

Complete this section if you wish to change the name in which your account is held. Please also provide copies of relevant documentation. Refer to the **Change of name ID documentation** section for details.

Authorisation

Complete this section to confirm:

- you have read and understood the information provided on this page,
- the information you have provided is true and correct and
- your request to change your details.

Change of name ID documentation

If you are changing your name, you need to submit proof of identity documentation if not previously provided.

Enclose certified copies of relevant documentation, such as:

- a copy of the marriage certificate, if the change of name is due to marriage
- a copy of the certificate of change of name, if the change of name is by deed poll.

Privacy and confidentiality

We collect and hold personal information to enable us to provide financial products and services to customers, and to help customers with their ongoing financial needs. If we do not collect this information, we may not be able to provide these services and products.

We may also need to collect personal information in order to meet our obligations under various laws.

We may also use personal information for other related purposes such as enhancing our customer service and product options, and informing customers about opportunities which may be of benefit to them through Direct Marketing. Customers can advise us they do not wish to receive this information via our general customer contact channels.

Personal information may be shared with business areas or companies within the AMP group. We may also provide information to local and overseas entities which provide AMP with administrative, financial, research or other services, other insurers and credit providers, financial planners, brokers and other organisations authorised by AMP to assist in reviewing customer needs. In all cases we take steps to make sure your privacy is protected.

We may also disclose personal information to courts, tribunals and disputes resolution bodies, government agencies, and other bodies we are required to provide information to under the law.

The AMP Privacy Policy (available at amp.com.au) provides more information about how we manage and protect the personal information we hold about individual. It sets out how you can access and update the information that AMP holds about you, and our processes for resolving privacy related enquiries and complaints.

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Please retain this information sheet for your records – do not return it with your completed form(s).

Change of details

Use this form to make changes to your address, contact details and name.

Please print in CAPITAL LETTERS and place a cross in any applicable boxes

1. Change of details options

What do you want to do?

Change your address

Change your contact details

Change your contact details

> Complete sections **1, 2, 3, 6** and **7**.

> Complete sections **1, 2, 4, 6** and **7**.

> Complete sections **1, 2, 5, 6** and **7**.

2. Current client details

Client number

Title

Date of birth

Surname

Given name(s)

Residential address

Suburb

State

Postcode

Contact phone number

Mobile number

3. Change of address

If you are changing your address, a residential address must be provided.

New residential address

New postal address (if different from above)

4. Change of contact details

Contact phone number

Mobile number

Email

5. Change of name

Please provide details of your new name below.

Title

Surname

Given name(s)

Former signature

New signature

6. Client authorisation

Authorisation:

- I/we acknowledge that I/we have fully read this form and confirm that the information I/we have provided is true and correct.
- I/we have provided the relevant documents to support changes in this form.
- I/we have read the above information and understand these conditions.

Client 1 signature

Client 1 name (Print in BLOCK LETTERS)

Client 1 signature

Date

Client 2 signature

Client 2 name (Print in BLOCK LETTERS)

Client 2 signature

Date

7. Checklist

- Have you completed all relevant sections of this form?
- Have you (and any joint account holder) signed this form where indicated?
- Have you attached certified copies of your identification documents? (if required)

Where to send this form

Mail, fax or email this completed form to:

North Service Centre
GPO Box 2915
MELBOURNE VIC 3001
Fax 1800 071 329
northonline.com.au
north@amp.com.au

Any questions?
1800 667 841