



For name changes, an original certified copy of the original documents will need to be provided. Please refer to the 'Completing Proof of Identity' document on [www.myexpand.com.au](http://www.myexpand.com.au) for a list of persons authorised to certify copies of original documents.

Signature of client/  
Power of Attorney or  
Guardian

Date

 /  / 

Previous signature  
(where name has  
changed)

Date

 /  / 

### Step 3: Change of entity name

New entity name

Previous entity name

Please provide supporting documentation as proof of change of name. Please only complete this section if the name of an entity has changed and not to update an entity associated with your account.

### Step 4: Change of account name for joint accounts

New account name

Previous account name

Please only use this section to update the name of the joint account. You cannot use this form to update the investors linked to the account.

### Step 5: Change of address

For a fast and convenient way to change your address, simply log into eXpand Online and enter your user ID and password.

If you have not registered for eXpand Online, please click on the 'Register for access' link and follow the instructions to gain access.

If you are unable to change your address online, please complete the details below.

Please select the address(es) that you require to update:

Residential address  Mailing address  Registered address  Principal place of business

Address

Suburb

State

Postcode

Country  
(if not Australia)

Phone (home)

Phone (work)

Mobile

Email

If you are residing overseas you must complete and submit:

- an Overseas Investor form ([www.myexpand.com.au](http://www.myexpand.com.au));
- original certified copies of your identification documents; and
- step 7 of this form.

## Step 6: Change of additional address

Please provide updated address if different from the address in Step 5.

Please select the address(es) that you require to update:

Residential address  Mailing address  Registered address  Principal place of business

Address					
Suburb		State		Postcode	
Phone (home)		Phone (work)			
Country (if not Australia)					

## Step 7: Change and confirmation of taxation residency details

Please answer **both** tax residency questions as you can be a tax resident of more than one country.

Is the Individual/Company/Trust/Partnership/Association a tax resident of Australia?  Yes  No

Is the Individual/Company/Trust/Partnership/Association a tax resident of any other Country?  Yes  No

If you are a tax resident of any other country please complete the details below.

### Foreign Residents only – Foreign Account Tax Compliance Act (FATCA) and Common Reporting Standard (CRS)

Under FATCA and CRS laws, we are required to ask all investors to provide additional information about their tax residency. Tax residency rules differ by country. Whether an individual is a tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work.

For all countries where you are a tax resident please provide a TIN (Tax Identification Number) which is the number assigned by each country for the purposes of administering tax laws such as a Social Security Number in the US. If a TIN cannot be provided, please list one of the three reasons specified (A, B or C) for not providing a TIN.

Country	TIN	If no TIN, please list Reason A, B or C

If there are more countries, provide details on a separate sheet and tick this box

#### Reasons for not providing a TIN:

Reason A – The country of tax residency does not issue TINs to tax residents, OR

Reason B – You have not been issued with a TIN – **please provide details for this reason**, OR

Reason C – The country of tax residency does not require the TIN to be disclosed.

Reason you have not been issued with a TIN (if applicable)

## Step 8: Declaration and signature(s)

**Please note:** The Service Operator collects the information in this form for the purpose of updating the information it holds about you. Any personal information provided in this form will be handled in accordance with the privacy policy at [www.myexpand.com.au/privacy](http://www.myexpand.com.au/privacy). If you do not provide all of the requested information, we may not be able to action your request.

- I/We will promptly notify the Service Operator if any of these details change and on request with any further information which is necessary or desirable for the Service Operator to comply with any obligations it may have in connection with FATCA/CRS.
- I/We consent to the collection and use of the above information by the Service Operator for the purposes specified.
- I/We authorise any changes set out in this form to be applied to or recorded against my/our account.
- I/We declare that the details given in this form are true and correct.

**Please note:** If this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this form unless we have already received it). You generally cannot sign under Power of Attorney if acting on behalf on entity.

## Signature

Signatory 1  Date  /  /

Full name

Role (such as Investor/  
Director/Trustee)

## Additional signatures (if required)

Signatory 2  Date  /  /

Role (such as Investor/  
Director/Trustee as applicable)

Full name

Signatory 3  Date  /  /

Role (such as Investor/  
Director/Trustee as applicable)

Full name

Signatory 4  Date  /  /

Role (such as Investor/  
Director/Trustee as applicable)

Full name

Signatory 5  Date  /  /

Role (such as Investor/  
Director/Trustee as applicable)

Full name

Signatory 6  Date  /  /

Role (such as Investor/  
Director/Trustee as applicable)

Full name

Common seal  
(of company) if required

**Please forward all correspondence and enquiries to**

- Post:** eXpand  
GPO Box 264, Melbourne VIC 3001
- Email:** [clientfirst@myexpand.com.au](mailto:clientfirst@myexpand.com.au)
- Telephone:** 1800 517 124
- Web:** [www.myexpand.com.au](http://www.myexpand.com.au)