

Vanguard® Personal Investor

Financial adviser access

Use this form if you are a Vanguard investor and would like to add, remove or change a financial adviser from having access to your Vanguard portfolio information.

! Important: A financial adviser can only be added to your account after they have registered for Vanguard Online.

If you have changed financial advisers, please fill out both sections 2 and 3 of the form.

Questions?

Call 1300 655 101 (Australia)

Call (+61) 3 8888 3888 (Overseas)

The Vanguard Personal Investor team is available from 8am to 6pm Monday to Friday (Melbourne time)

1. Account details (must be completed)

Account number <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Contact phone number(s) ()
Investor name <input type="text"/>	

2. Adding a financial adviser

Please provide the below details of the financial adviser you wish to give access to your information. All advisers registered with Vanguard will have an adviser number.

Vanguard Adviser number (Required) <input type="text"/>
Australian Financial Services Licence number <input type="text"/>
Adviser name <input type="text"/>
Business name <input type="text"/>

Monitoring of your portfolio by your adviser

We may share your investment information such as investor name, fund name, transactions and portfolio holdings with data aggregators to make it easier for your adviser to monitor your portfolio and provide you with ongoing advice.

3. Removing a financial adviser

I am no longer advised by the financial adviser on record.

4. Declaration (must be completed)

By ticking this box you are confirming that you are authorised to provide us with these instructions.

Vanguard is committed to respecting the privacy of your personal information. For information about Vanguard's approach to managing your personal information, please view our Privacy Policy at <https://www.vanguard.com.au/personal/en/privacy>.

What's next?

Please return your completed form via Vanguard Online secure message.