Australian Financial Services Licensee Checklist

Please use this checklist to ensure you have the required documents for AMP to process your request.

AMP Wealth Distribution agreement and supporting documents

1. Licensee Agreement
   - ensure you have arranged for the appropriate signatories to sign the agreement and have provided the correct Bank account details for your Licensee.

2. A copy of the Licensee's current Professional Indemnity Certificate of Insurance (min. $1 million)

Adviser set up and supporting documents

The Adviser must be appointed on ASIC under your AFSL before an Adviser code can be issued.

1. Adviser Set Up Form

2. A certified copy of identification (driver's licence or passport) for your adviser

Transfer of policies from another licensee

The Adviser must be appointment on ASIC under your AFSL before policies can be transferred.

1. Release letter from the previous licensee

2. Signed Wealth Account Transfer form if transferring super or pension products

Contact us – Licensing and Onboarding Team

When you are ready, email all documents to licensing_requests@amp.com.au.

You can contact us on 136 267 (options 0, 5, 1) or email us at licensing_requests@amp.com.au.