

Wealth Account Transfer Form

Use this form to authorise AWM Services Pty Ltd ("AWMS") and N.M. Superannuation Proprietary Limited ("the Trustee") to transfer AMP Wealth accounts with current fixed term agreements or ongoing fee arrangements, and associated servicing rights, from one Australian Financial Services Licence (AFSL) holder ("the Transferor") to another AFSL ("the Transferee").

This form must be completed by the Transferee. Please attach the Transferor's release of clients' authority.

1. AFSL details

Transferor

Name of AFSL holder

AFSL number

Transferee

Name of AFSL holder

AFSL number

2. Financial Adviser details

Please provide details for the Financial Advisers that are moving to the Transferee:

Financial Adviser name 1

ASIC FA/AR number

Financial Adviser name 2

ASIC FA/AR number

Financial Adviser name 3

ASIC FA/AR number

If there are more than 3 Financial Advisers moving to the Transferee, please attach a list to this form.

3. Acknowledgement and declaration

I/We acknowledge and declare that:

- the Transferee has signed a Licensee Agreement with AWMS,
- the transfer of AMP Wealth accounts from one AFSL to another will be effective on the date it is processed by AMP,
- the Financial Advisers named in this form are current on the ASIC Financial Advisers Register,
- the Transferee has informed the Wealth account holders of the transfer of the AMP Wealth accounts to them,
- the Financial Advisers will continue to provide the agreed advice services to the Wealth account holders with no change of terms.

This form must be signed by either two AFSL directors or one AFSL director and the AFSL company secretary or authorised signatory unless sole director/secretary.

Transferee signatory 1 – AFSL director

Name

Signature

Date

Transferee signatory 2 – Authorised signatory

Name

Signature

Date

AMP Instructions:

Existing request – send to the email address you've been given and include reference numbers

New request for the sale of clients on your register – dssregister@amp.com.au

New request to transfer your clients to a new licensee – licensing_requests@amp.com.au

This form is not for use by subsidiaries of AMP Limited