

Living Super Adviser accreditation form



Once you have completed and signed the Adviser Accreditation Form, please send it to us at: adviser@livingsuper.onesuper.com.au

Step 1: Adviser personal details

Title	First name	Middle name	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth (DD/MM/YYYY)	Nationality	Country of birth	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Contact details

Residential address

Unit number	Street number	Street name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>
Business phone number	Fax number	Mobile
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address		
<input type="text"/>		

Business details

Business name		
<input type="text"/>		
Business address		
Unit number	Street number	Street name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 2: Compliance details

Name of dealer group - Australian Financial Services Licence (AFSL) holder	AFSL number
<input type="text"/>	<input type="text"/>

To help us verify your identity when you contact us, please provide the following:

Secret question (e.g. What is your mother's maiden name?)

Answer

Step 3: Declaration - Adviser to read and sign

Yes No Have you ever declared bankruptcy?

Yes No Have you ever been found guilty of an offence involving fraud, dishonesty, drug trafficking or money laundering?

If 'Yes', please explain:



Yes No Has your accreditation ever been refused or revoked with any other product or banned or suspended by a Financial Services Regulator?

If 'Yes', please explain:

By signing the below, I:

- a) declare that the personal information and security details provided are true and correct and I authorise the Trustee to verify this information;
- b) acknowledge that the Living Super Privacy Policy is available to me [here](#), or on request before providing any personal information in this form and I consent to my personal information being collected, used and disclosed in the manner and for the purposes set out in the Privacy Policy;
- c) agree to comply with the terms of any guide, policy or code provided by the Trustee from time to time;
- d) understand that as a Living Super Accredited adviser, I will be granted access to the Living Super adviser portal. I have read, understood and agree to the portal Terms and Conditions available [here](#);
- e) declare I will hold and maintain any licences, authorisations, permits or approvals required for me to comply with the relevant legislation when advising on or dealing in financial products; and
- f) understand the representations have been made to the Trustee to enable it to determine whether or not to accredit me as an adviser. I understand and acknowledge that the Trustee is relying on the information in this form to determine whether to offer accreditation.

Name of Advisor

Signed by Advisor

Date (DD/MM/YY)

/ /

Step 4: Dealer Group Declaration - Authorised Signatory to read and sign below

By signing the below, I/we agree to ensure that the person named as the Adviser above holds all appropriate licences, authorisations, permits and approvals for the Adviser to perform the Adviser obligations.

Name of Authorised Signatory

Signature of Authorised Signatory

Date (DD/MM/YY)

/ /

Name of Authorised Signatory

Signature of Authorised Signatory

Date (DD/MM/YY)

/ /

Name of Authorised Signatory

Signature of Authorised Signatory

Date (DD/MM/YY)

/ /

Important Note: an individual's accreditation is conditional upon execution of the Living Super Distribution Agreement by the Dealer Group.

Step 5: What to do when you have completed this form

Once you have completed and signed the Adviser Accreditation Form, please send it to us at: adviser@livingsuper.onesuper.com.au

To ensure the Trustee processes your accreditation without any delay take some time to go through the checklist below:

Have you completed all sections of the form in full? Yes No

Have you supplied certified ID documents? Yes No



Step 6: Identification Documents and Certification

Identification documents

Please provide a certified copy of Drivers Licence OR Passport.

The documents must verify the following details:

- Your full name; and
- Date of Birth.

Document certification

Take the originals and copies of your identification documents to a document certifier from the list below. Ask them to follow the Instructions below.

1. A Pharmacist
2. A Justice of the Peace
3. A Notary Public Officer
4. A Medical Practitioner or Nurse
5. A Police Officer
6. An Accountant (CA/CPA)
7. A Legal Practitioner
8. A Full-time teacher (school or tertiary)
9. Bank/Credit Union/Building Society Officer with at least two years continuous service
10. A permanent employee of a Commonwealth, State/Territory or local government with at least two years continuous service.

Certifier instructions

Once you (the certifier) have sighted the original proof of identity document and the copy and confirmed that both documents are identical on each page of the copy complete the following:

1. Certify as true copies by writing or stamping "I hereby certify that these pages are a true copy of the original document shown to me on [date]"
2. Sign each document and print your Name and Certifier Classification. For example; John Smith, Accountant

Step 7: Privacy Statements and Privacy Policy

Privacy Policy for Living Super

Diversa Trustees Limited (ABN 49 006 421 638, AFSL 235153 RSE L0000635) (Diversa/the Trustee), the trustee of Living Super, a sub-plan of OneSuper (ABN 43 905 581 638) is committed to ensuring the confidentiality and security of your personal information. Diversa collects and handles your personal information in accordance with its legal obligations, including those under the Privacy Act 1998 (Cth). Diversa uses personal information in this form to confirm that you are authorised and appropriate to be accredited to advise or deal in Diversa's products and use its online advice tools. To find out more about how Diversa handles your personal information, how you can access or seek to correct personal information about you held by Diversa, and Diversa's privacy complaints process, you can review the Living Super Privacy Policy [here](#), or request a copy by either calling or writing to us.

How to contact us

If you have any further questions about privacy in relation to Living Super please contact us by:

- calling: 133 464
- emailing: livingsuper@onesuper.com.au
- writing to: Living Super Privacy Officer
Reply Paid 93910
MELBOURNE VIC 3001

The Living Super [Privacy Policy](#) may be updated from time to time as the Trustee strives to improve the standard of service provided to you.

For the curious: This information was prepared and sent on behalf of Diversa Trustees Limited ABN 49 006 421 638, AFSL 235153, RSE L0000635 (Diversa, the Trustee, we, our and us), the Trustee of Living Super, a sub-plan of OneSuper ABN 43 905 581 638 (Fund) and the issuer of interests in the Fund. Living Super is a product issued out of the Fund. Insurance cover offered by the Fund is provided by MetLife Insurance Limited ABN 75 004 274 882 AFSL 238096. The information contained above is general advice only and has been prepared without taking account of your objectives, financial situation or needs. Consider your personal circumstances, the appropriateness of the product and read the Product Disclosure Statement, Product Guide and Financial Service Guide before making any decision to acquire or continue to hold the product. These documents together with the relevant Target Market Determinations are available at ing.com.au. You may also decide to seek independent financial advice before making a decision about the product. ING is a business name of ING Bank (Australia) Limited ABN 24 000 893 292, AFSL 229823 and is the sponsor of Living Super. An investment in Living Super is neither a deposit nor liability of ING Bank (Australia) Limited or any of its related corporations and none of them stands behind or guarantees the Fund.

