



New authorised representative form

AIA AUSTRALIA

Please complete this form using **BLACK INK** and print well within the boxes in **CAPITAL LETTERS**. Mark appropriate answer boxes with a tick like the following (✓). Start at the left of each answer space and leave a gap between words.

Thank you for taking the time to complete your new Authorised Representative form. To ensure that we set you up correctly, please read this form carefully. For your convenience, we have provided a checklist of requirements to follow, before returning your completed form. Where you have more than one authorised representative, please copy this form, or alternatively please attach a list ensuring the mandatory field requirements are provided.

Your Applicant reference number if required

Checklist

- All fields marked with an asterisk (*) are mandatory and are required to successfully set up your New Adviser code.
- Current copy of *Authorised Representative Certificate
- Full transfer – please provide a copy of the 'Release and / or acceptance letters from respective Licensees
- Partial Transfer – please provide a copy of the *Release letter and *List of clients name and policy numbers
- * Page 4 – The Collection and use of Authorised Representatives' and Corporate representatives' has been given to the relevant Representative for their file.
- Please email a scanned copy of this form and requirements to au.retailadviseradmin@aia.com

Please note: To be registered as an Authorised Representative the AFSL must already be registered with us or complete a New Distributor Terms of Trade Application Form.

Section 1 – New individual authorised representative information

*AFSL name

*AFSL number

*Adviser's ASIC Authorised Representative number

*Date of birth

Title Mr Mrs Miss Ms Other

*Given name

Middle name

*Surname

Preferred Name (if applicable)

*Email

*Phone number

Fax number

*Mobile number

***Registered business address (PO Box is not acceptable)**

Unit number Street number Street name

Suburb State Postcode

Country

Postal address Tick (✓) in this box if same as the business address above

Unit number Street number Street name

Suburb State Postcode

Country

Section 2 – Corporate authorised representative

Complete this section **only** where your groups operate under a corporate authorised representative.

Where you have more than one corporate authorised representative, please copy this section, or alternatively please attach a list ensuring the mandatory field requirements are provided.

*AFSL name

*AFSL number

*ASIC Corporate Authorised Representative number

*Company name

ABN

*Email

*Phone number

Fax number

*Mobile number

***Registered business address (PO Box is not acceptable)**

Unit number Street number Street name

Suburb State Postcode

Country

Postal address Tick (✓) in this box if same as the business address above

Unit number Street number Street name

Suburb State Postcode

Country

PRIMARY CONTACT IDENTIFICATION

*Primary contact name

REPRESENTATIVE IDENTIFICATION

When you have more than one representative that provides advice, under the Corporate Authorised Representative, please copy this section or alternatively please attach a list ensuring the mandatory field requirements are provided.

Title Mr Mrs Miss Ms Other / /

*Given name

Middle name

*Surname

Preferred Name (if applicable)

*Email

*Phone number

Fax number

*Mobile number

Please email a scanned copy to au.retailadviseradmin@aia.com

The collection and use of Authorised Representatives' and Representatives' personal information

- a. AIA Australia may collect personal information from the Authorised Representatives and Corporate Representatives. This may include, but is not limited to, their name, contact details, date of birth, driver licence or other forms of identification the Group considers necessary.
- b. AIA Australia may use personal information regarding the Authorised Representatives and Corporate Representatives for the following: Identification;
- Assessing application for registration;
 - Statistical, prudential, risk management, actuarial and research purposes;
 - Assisting customers with queries; and
 - Marketing.
- c. AIA Australia may need to disclose the Authorised Representatives and Corporate Representatives personal information to other members of the Group. This enables the Group to provide services and support and to maintain an integrated view of all third parties which the Group undertakes dealings with. From time to time in the ordinary conduct of our business, the Authorised Representatives' and Corporate Representatives' personal information may also need to be disclosed to government organisations, such as ASIC, where we are legally obliged to do so.
- d. Where personal information is disclosed, AIA Australia will seek to ensure that the information is held, used or disclosed consistently with the Privacy Laws, and any other applicable Privacy Laws and codes.
- e. Subject to certain permitted exceptions, Authorised Representatives and Corporate Representatives are entitled to access Personal Information we hold about them. For more information about our privacy and information handling practices, please refer to the Privacy Policy, which is available through www.aia.com.au/privacy

This page is to be retained by the relevant Authorised Representative or Corporate Representative.