



Complete this form to update your legal name on your Selfwealth account. To update multiple accounts, please include all account numbers in the 'Selfwealth ID' section below.

Once completed and signed, please return it to **support@selfwealth.com.au** along with the required documentation specified in section 2.

Acceptable Forms of Identification for Name Change

Acceptable form of identification for a name for an Individual or Joint account:

- Australian driver's licence
- Australian or International passport (can be expired within the preceding two years but not cancelled)
- A NSW photo card
- Proof of age card (card issued under a State or Territory for the purpose of proving a person's age and containing a photograph of the person)

Who can certify documents?

An approved certifier must be an Australian citizen or permanent resident and can be any of the following:

- A judge of a court
- A Justice of the Peace
- A chief executive officer of a Commonwealth court
- A notary public (for the purposes of the Statutory Declaration Regulations 1993)
- An agent of the Australian Postal Corporation who is in charge of supplying postal services to the public
- A permanent employee of Australia Post (with two or more years of continuous service)
- An accountant with at least two years continuous service (who's also a member of the Australian Institute of Chartered Accountants, CPA Australia, or the National Institute of Accountants)
- A finance company officer with two or more continuous years of service with one or more financial institutions (for the purposes of the Statutory Declarations Regulations 1993)
- A licensed legal practitioner
- A magistrate
- A registrar or deputy registrar of a court
- A police officer
- An Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955)

1. Your Selfwealth account details

Your Selfwealth ID

Your Selfwealth ID can be located by selecting your portfolio > Trading Account > Account Details

S-

Selfwealth trading account name

2. Required documentation

- Changing Name due to Marriage:** A certified copy of the marriage certificate AND a certified copy of an acceptable form of ID (see page 1) displaying the new name.
- Change of Name Due to Formal Name Change:** A certified copy of government-issued-change-of-name certificate AND a certified copy of an acceptable form of ID (see page 1) displaying the new name.
- Change of Name Due to Divorce:** A certified copy of decree NISI, a certified copy of your birth certificate AND a certified copy of an acceptable form of ID (see page 1) displaying the new name.
- Change of individual name due to error:** A certified copy of acceptable form of ID (see page 1) showing correct name.
- Add or Remove Middle Name:** A certified copy of an acceptable form of ID (see page 1) showing the new name.

3. Change of name

EXISTING name

Title

Given name(s)

Surname

NEW name

Title

Given name(s)

Surname

4. Signatures

By signing this document, I/we authorise Selfwealth and their service providers to carry out the instruction to change my/our name.

All account holders must sign. For company accounts, sign in accordance with the company's constitution.

Account holder 1 *Digital signature not accepted*

/ /

Signature

Account holder 2 *Digital signature not accepted*

/ /

Signature