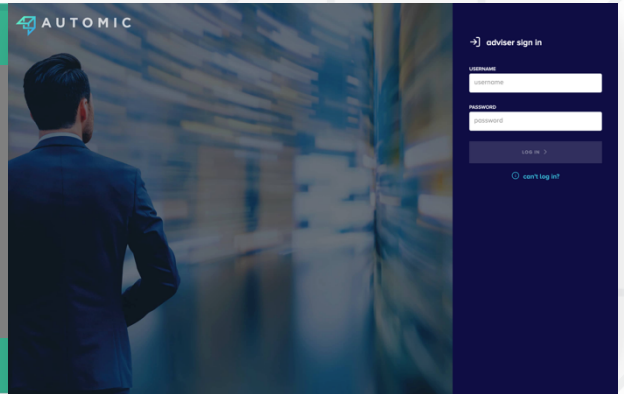


AUTOMIC ADVISER PORTAL: Application Form



PURPOSE: This form is for Australian registered Financial Advisors to make an application to register for an Automic Group Adviser portal account.

Financial Advisors are individuals who are registered on the Financial Advisers Register, that is managed by ASIC. For further information please see: <https://moneysmart.gov.au/financial-advice/financial-advisers-register>

Australian registered Financial Advisors can apply for an account by completing the steps below:

Step 1: Your Details

Please complete all the information requested below, then sign and return the form to us.

YOUR INFORMATION:

Adviser Name:

(As shown on Financial Advisers Register)

Financial Adviser Number:

(As issued by ASIC)

Name of AFSL Holder:

AFSL Number:

YOUR CONTACT DETAILS:

Email Address:

(Your business email address only)

Mobile Phone Number:

YOUR SIGNATURE:

Sign Here:

(Signature of the above-named adviser)

Step 2: Return Your Application

Please return this completed and signed application to us by email at:

 advisers@automic.com.au

Step 3: Identity Verification

On processing your application, an application confirmation containing a personalised URL will be sent to the email address provided above for you to complete an electronic identity verification.

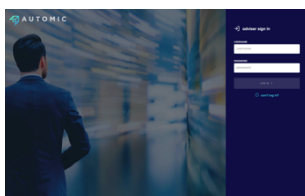
Please Note: This is a mandatory step. An Automic Adviser Portal account will not be issued to you until this stage has been successfully completed.

Step 4: Access to Your Clients

Upon successful completion of your identity verification, we will send you by email a link to activate your new Adviser Portal account and create a password.

Those clients who have already nominated you as their Adviser will be automatically displayed in your account. If any of your clients are not shown in your account, please request for them to log into the **Automic Investor Portal** to nominate your name as their registered Financial Adviser in the system. The changes are updated in real-time.

Please Note: This is also a mandatory step. To protect their personal information, only the client can grant permission for you to access their data. This complies with the Privacy Act and Australian Privacy Principle 11 (Security of Personal Information).



Automic Adviser Portal is available now at:
<https://adviser.automic.com.au/login>
or scan the QR code

