Australian Expatriate Superannuation Fund

AESF Adviser Portal Registration Form

This form is for advisers and administrators to request access to the AESF Adviser Portal.

Please complete this form in full if your your business currently uses the AESF Adviser Portal and you need to set up an additional administrator

Important Information

- For each new adviser or administrator access request, a certified copy of the individual's Passport or Driver's License must be provided. Certification must be dated within the past 12 months.
- If you are a new Adviser to AESF Adviser Portal and you have a client with an existing account, you can complete and submit Form 2 along with this registration form to access their account.
- If you need to transfer a number of clients, you can utilise our bulk transfer process. Please contact us for more details.

Part 1 - Adviser Business Details

My business operates as an:

- ◯ Authorised Representative (AR) of the Australian Financial Services Licensee
- ◯ Corporate Authorised Representative (CAR) of the Australian Financial ServicesLicensee (AFSL)
- ◯ Self-licensed Australian Financial Services Licensee (AFSL)

Business Name as it appears on ASIC register

Trading Name, if different to ASIC registered name

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Part 2 - User Details

Important:

For each new user registration request, this section must be completed in full and accompanied by a certified copy of the user's ID.

Additional copies of this page may be attached where multiple users are being registered.

Your AESF Advsier Portal user ID will be the user's email address

First Name

Surname

Job Title

User Type ◯ Adviser ◯ Administrator

FOR ADVISERS ONLY What is the AFS Representative Number? OR ☐ N/A

Work Address ◯ Same as registered business address

Street address 1

Street address 2

Suburb State/Territory Postcode

Email Phone Number

◯ Receive email updates for outages and planned maintenance on the Adviser Portal.

Mailing Address ◯ Same as above

Street address 1

Street address 2

Suburb State/Territory Postcode

User Permissions ◯ Visibility of all clients in organisation

◯ Restricted to clients aligned with an adviser, team or location (specify if known):

Adviser Signature