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**Transfer and Consent Form**

**Account Transfer Authorisation**

|  |  |
| --- | --- |
| **Account Name:** |  |
| **Account Number:** |  |

**Dear Investor,**

Thank you for your confidence in us and your decision to transfer your account from the Partnervest service on the OneVue/Praemium platform to the new SimpleInvest service on the OpenInvest platform.

To proceed with the transfer of your account and investments, please review and confirm the following authorisations, by signing below:

**Authorisation to Transfer Our Account**

We confirm our instructions to **OneVue Wealth Services Ltd, Praemium Australia Limited, Partnervest Pty Ltd, and OpenInvest Limited** ("the Parties") to take all necessary actions to:

* Open an account in the **SimpleInvest** service on the OpenInvest platform; and
* Transfer our assets from the OneVue/Praemium platform (as the case maybe) to the OpenInvest platform (via an in-specie transfer).

**Acknowledgements & Authorisations**

We confirm the following:

1. **Authorisation to Share Our Account Information**  
We authorise **OneVue, Praemium** **and Partnervest** to provide our account information to **OpenInvest** for the purpose of opening an account in SimpleInvest on our behalf. This includes information relating to banking, regular contribution and withdrawal information, as necessary.

2. **Account Opening and Legal Compliance**  
We authorise **OpenInvest** to use our personal account information provided by OneVue, Praemium and Partnervest to open our account, including to conduct Anti-Money Laundering and Counter-Terrorism Financing (AML/CTF) background checks, in accordance with its legal obligations.

We also confirm that:

✔️ All signatories over **18 years of age** and an **Australian tax resident** with an Australian residential address.

✔️ I/We have **read and understood** the **Product Disclosure Statement (PDS) and Target Market Determination (TMD)** (available at <https://www.partnervest.com.au/>), for SimpleInvest, and I **agree** to the fees, authorisations, acknowledgements, and declarations outlined in these documents.

✔️ I/We understand that the **Parties may contact me** should they require further information to complete account opening and transfer of investments.

✔️I/We acknowledge that by transferring my account to SimpleInvest, I will be bound by the terms and conditions outlined in the PDS, TMD, and other relevant disclosure documents.

✔️ I/We have had an opportunity to review **other relevant disclosure documents** on the Partnervest website.

3. **Authorisation to Transfer My Investments via In-Specie Process**  
I authorise **OneVue, Praemium and OpenInvest** to take all necessary actions to:

* Transfer all **existing assets including cash**, from our account on the OneVue/Praemium platform (as the case may be) to our new SimpleInvest account on the OpenInvest platform.
* Share relevant details of our **asset holdings and tax parcels** to facilitate the transfer.
* **Close our account on OneVue/Praemium** once the transfer is complete.

|  |  |
| --- | --- |
| **Person 1/ Director 1/Secretary:** | **Person 2/ Director 2 (if applicable):** |
| Name: | Name: |
| Signature: | Signature: |

**Please return this signed and completed form to** [sergpremier@partnervest.com.au](mailto:sergpremier@partnervest.com.au)

**Next Steps**

Once your **new SimpleInvest account is established**, we will provide you with **your** **new login and password details** to access your account.

If you have any questions, please contact me at [sergpremier@partnervest.com.au](mailto:sergpremier@partnervest.com.au) or call me on 0425 746 711.

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