

Macquarie Third Party Authority Form

To enable Macquarie cash balance visibility on your client/s AUSIEX online trading account, you will need to provide Macquarie with your client/s consent.

Instructions

Please only complete and return the following sections in the attached form:

- **Section 1:** Macquarie account details
- **Section 5:** Declaration and signature of account holders

Section 2: Appointment of a Financial Services Company details have already been pre-populated with the required company and authority level information, so no further action is required.

Once complete, you can return the form via one of the following methods:

- Email: transact@macquarie.com
- Mail: Reply Paid 85744, Sydney, NSW 2001

Please be advised your request will take between 24-48 hours to action.

More information

If your client has a Macquarie Cash Management Account (CMA) that was opened prior to 2008, it is possible the account may have been set up with a BSB that is incompatible with our Macquarie cash integration.

If you believe your client may have an older CMA, please check their account has a BSB of 182 512 before proceeding with this authority form.

We're here to help

If you have further questions, please contact the AUSIEX Adviser Services team on **1800 252 351**.

Financial Services Company or Professional third party authority form

Macquarie Bank Limited ABN 46 008 583 542 AFSL 237502. Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281.
Macquarie Equities Limited ABN 41 002 574 923 AFSL 237504.

Use this form to authorise a Financial Services Company or Professional to operate or view your Macquarie Cash Hub Account, Macquarie Wrap Account, Macquarie Vision Account and/or Macquarie Term Deposit Account on your behalf and specify the level of authority you wish to give them.

Please consider carefully who you appoint as a third party authority on your accounts as we may follow their instructions as if they were yours. They will have access to your account details (BSB, account number and account name), account balance and transaction history, which includes your personal information. It's important that you understand this risk and carefully consider what level of authority you give to them.

Refer to the relevant 'Wrap Change of Account Details' form to replace your primary Financial Services Professional for Wrap Cash Accounts and/or Vision Cash Accounts.

Third parties appointed on a Wrap Cash Account and/or Vision Cash Account will also have access to account details and reporting of other accounts within the same group.

To understand the requirements for adding or removing a third party authority on your account, visit '**Guide to completing CMA Third Party Authority forms**' in our Personal Help Centre.

For more information, visit '**Set up a third party authority for your accounts**' in our Personal Help Centre.

The account holder(s) are required to complete the following:

- ▶ **To appoint a financial services company as a third party authority, complete sections 1, 2 and 5**
- ▶ **To appoint a financial services professional as a third party authority, complete sections 1, 3 and 5**
- ▶ **To remove an existing third party authority on your account, complete sections 1, 4 and 5**

1. Your Macquarie account details

Account number:

Account name:

2. Appointment of a Financial Services Company

You can use this section to appoint a company or other third party firm (e.g. a financial advisory firm, stockbroking firm, accounting firm or administrator) to have access and/or withdrawal authority to your account.

Company name:

Company code/bulk transacting code (if known):

2. Appointment of a Financial Services Company (Continued)

Select all that apply:

General Withdrawal Authority^{1,2}
(not required for AIP)

Tax Payment Authority^{1,2}

Financial Services Debit Authority^{1,2}

View Authority³

Accelerator Account Transfer Authority

Term Deposit Authority²

Note: See Section 6 for definitions of Third Party Authorities available to Financial Service Companies.

To remove an existing Financial Services Company, **complete section 4.**

3. Appointment of a Financial Services Professional

Appoint a Financial Services Professional (for example a financial adviser or accountant) to have View Authority to your account. Your Financial Services Professional will automatically be granted Accelerator Account Transfer Authority on your CMA Accelerator (if applicable).

Full name:

Macquarie ID (if known):

If your Financial Services Professional does not have a Macquarie ID, they will need to complete the Macquarie Registration – Representative form.

Company:

Company Code (if known):

Representative Code (if known):

To remove an existing Financial Services Professional, **complete section 4.**

4. Would you like to remove a Third Party Authority Level, or Financial Services Professional or Company Access?

Yes, please specify:

- Unless otherwise agreed with us, removing a Financial Services Company will also remove all associated Financial Service Professional access, as well as their ability to set up and operate Direct Debits arrangements, scheduled payments, and edit mailing addresses.
- If you have also appointed the third party as a 'nominated representative' to share Consumer Data Right (CDR) data from your selected account(s), you will need to separately revoke them as a nominated representative (for information on how to revoke a nominated representative or for information on CDR generally, visit macquarie.com.au/help and search for 'Open Banking and the Consumer Data Right').

5. Declaration and signature of account holders

Your request must be signed in accordance with your account signing instructions. Please note that the directors/secretary who sign must be existing account signatories. I/we:

- accept and agree to be bound by the terms and conditions in the applicable Account Terms and Conditions
- authorise the person or entity whose name appears in section 2 and/or 3, which includes the individual signatories appointed by the company/dealer group, to view/operate my/our account, and
- acknowledge and agree that any person appointed in section 2 and/or 3, will automatically be granted View authority on any Accelerator/Vision Savings Account that is linked to my/our Macquarie CMA/Vision Cash Account, and
- where you are an attorney for an account holder, you declare that the appointment of any person as set out in section 2 and/or 3 does not constitute an appointment as a substitute, delegate or sub-attorney.

1. Requires Bulk Transacting Access.

2. This authority type is not available on Macquarie Cash Management Accelerator Accounts or Vision Savings Accounts.

3. View Authority appointed on a Macquarie Cash Management Account or Vision Cash Account will automatically be replicated on the linked Macquarie Cash Management Accelerator Account or Vision Savings Account.

5. Declaration and signature of account holders (Continued)

Signature 1:

Signature 2:

Date (DDMMYYYY):

Date (DDMMYYYY):

Name:

Name:

6. Third Party Levels of Authority

 **It's important you understand what level of access you are granting a third party. You can revoke these authorities at any time by contacting us.**

To see a summary of the different levels of authority you can appoint to certain third parties and what that Authorised User can do, please refer to our **Terms and Conditions**.

Sign

- ☒ **Wet signature**, please provide a copy of your Driver's Licence or passport. **OR**
- ☒ **Electronic signature** - please provide a copy of the Certificate of Completion.
Visit Personal Help Centre and search 'Electronic Signature' to view our approved list of electronic signature providers.

Need Help?

For more information, please visit **Personal Help Centre**.

Submit



Email to transact@macquarie.com