

Adviser registration

Use this form to:

- register to provide advice relating to Macquarie products and services
- register as a Financial Services professional
- obtain access to another adviser's clients or a corporate adviser code.

This will provide you with access to Macquarie Online.

 To make phone identification easier, once you have been registered you can set up voice ID by contacting us on 1800 808 508.

If you wish to register support staff please refer to the Support staff registration form.

1 Adviser information

Macquarie ID (if known):

Title: Given name(s):

Surname:

Any other name known by:

Please select how you would like to be registered:

- Financial Adviser (Individual)
- Financial Adviser (Corporate), name of entity:
- Other Financial Services Professional (ie Accountant)
- Access to another adviser's clients or a corporate adviser code

Your details

 **All fields marked with a red asterisk (*) are mandatory.**

* Date of birth: /

* Email address:

* Mobile number: Business number:

Business name:

*** Office address (can't be a PO Box)**

Street number and name:

Suburb: State: Postcode:

Is your mailing address the same? Yes No, please complete the below

Mailing address

Street number and name:

Suburb: State: Postcode:

If you are registering for access to another adviser's clients or a corporate adviser code ► **go to section 4**

Adviser information (continued)

 **All below fields are mandatory**

Electronic Verification

I have attached a certified copy of my government identification

No ► **please complete the below** Yes ► **go to section 2**

Government Identification Details (This is for verification purposes only)

ID type (Drivers Licence, Passport, Proof of Age):

Licence/Document number:

State of Issue (if using a passport, input Country of Issue):

Drivers licence card number (Only if present on ID):

Residential address

Street number and name:

Suburb:

State:

Postcode:

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Dealer information

If your Dealer/Licensee is not registered with Macquarie, it can register by completing the *Dealer Registration* form.

 **All below fields are mandatory**

Dealer name:

Dealer code:

Does your company hold an Australian Financial Services Licence (AFSL) number?

No

Yes, AFSL number:

AFSL name (if different):

 **For AFSL representatives who do not hold an ASIC Authorised Representative Number, please attach a letter of authority from your licence holder.**

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Product selection

Please select which products you would like to be registered for:

All products Macquarie Cash Macquarie Online Trading Macquarie Wrap

If you select Macquarie Online Trading and/or Macquarie Wrap, you will also be set up for Macquarie Cash

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Access to another adviser's clients

Please use this section to nominate the adviser details and level of access required for the individual in section 1.

Levels of authority:

Enquiry - Provides online view access and the ability to initiate a cash payment for a client. This level will be granted for Macquarie Cash.

Limited Transact - Provides online view access and the ability to generate investment transactions (which require authorisation by an individual with Transact authority).

Transact - Provides online view access and the ability to generate and authorise investment transactions.

If you do not make a selection, Enquiry level will be granted.

Adviser 1

Adviser name

Apply to all my adviser codes

OR

Apply to the following codes only

Level of authority

Macquarie Wrap: Enquiry Limited transact Transact

Macquarie Online Trading: Enquiry Transact

Existing adviser signature

Date: / /

Adviser 2

Adviser name

Apply to all my adviser codes

OR

Apply to the following codes only

Level of authority

Macquarie Wrap: Enquiry Limited transact Transact

Macquarie Online Trading: Enquiry Transact

Existing adviser signature

Date: / /

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Declaration and signature



You can sign this form electronically via one of our approved electronic signature providers and submit the form via email with any additional documentation required. Please visit Help Centre to view our submission requirements and a list of our approved electronic signature providers.

This section is to be signed by the adviser or financial services professional whose details have been provided in section 1 of the form.

Before accessing Adviser Online you should carefully read the Adviser Online Terms and Conditions available on our website at macquarie.com.au/site/adviser-online/terms-and-conditions.html. Signing this form will constitute your agreement to the Adviser Online Terms and Conditions.

By signing this section, I confirm that:

- I have read and agree to be bound by the terms and conditions set out on our website at macquarie.com.au/site/adviser-online/terms-and-conditions
- I must not provide advice unless I am properly authorised to do so.
- I agree to the Macquarie Group Privacy Policy available on macquarie.com.au and for my identity to be verified electronically using government sources and information held by credit reporting agencies, such as Equifax. Go to macquarie.com.au/everyday-banking/macquarie-client-identity-verification to learn more.

Signature:

Date:

Name:

Please return this form via email to adviser@macquarie.com and retain a copy for your records. For more information visit us online at macquarie.com/adviser or contact us by phone on **1800 808 508**.