

Macquarie Wrap

Third party registration form

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281. Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496. Macquarie Bank Limited ABN 46 008 583 542 AFSL 237502 is the issuer of the Macquarie Cash Management Account (CMA), Macquarie Consolidator Cash Account (Cash Account) and Macquarie Wrap Cash Account (Wrap Cash Account).



Use this form to register as a third party with Macquarie Wrap. Third parties will have online view only access to Wrap accounts (once access has been granted by the account holder).

Once you have registered your company and your employees as a third party with Macquarie Wrap, your clients will be able to grant you access to view their Wrap accounts online through the Wrap website by completing the *Third Party Authority* form.

Updating information

This form can also be used to update the information we hold for your business or your staff.

If your firm has been registered as a third party with Macquarie Wrap and you are now updating your details or registering additional staff, you only need to complete the fields you want to update.

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Business registration (Company/Firm/Sole trader)

Fields marked with an asterisk (*) are mandatory.

☐ New third party registration OR ☐ Updating third party registration

***Which of the following best describes your business?** Please select only one.

☐ Accountancy practice ☐ Mortgage Broking Practice ☐ Legal practice ☐ SMSF Administrator ☐ Margin Lender

*Business name of company/firm/sole trader:

! **Mandatory: you are required to attach a copy of your Certificate of Business Registration in order to complete the registration.**

*Contact name:

Please note: if the contact also required third party access, they must be listed in section 3.

*Mailing address

*Street number and name or PO Box:

*Suburb:

*State:

*Postcode:

*Business address (note: cannot be a PO Box)

*Street number and name:

*Suburb:

*State:

*Postcode:

Business email:

Phone:

*ABN/ACN:

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Authorised signatories

Firms

Must be signed by at least two partners or signatories of the firm.

Companies

Must be signed by either:

- two directors
- a director and secretary, or
- sole director.

Signature:

Date:

Name:

Corporate title if company officer:

Signature:

Date:

Name:

Corporate title if company officer:

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Registration of employee(s)

- Please supply details of the employee(s) who should be registered for Wrap third party access as part of this registration.
- Please photocopy this page if you need to register more employees.

3A. Registering employee(s) who will be authorised by clients

i. **For SMSF Administrator or Margin Lender (note: you can only nominate one employee)**

Use this section to nominate **one** employee who your clients will authorise for third party access using the *Third Party Authority* form.

You can nominate additional employee(s) as administration staff. They will have access to **all** authorised accounts across the company/firm (refer to section 3B).

Please select either:

☐ New/Replace OR ☐ Update details

Title:

*Given name(s):

*Surname:

Date of birth:

*Email:

Phone:

***Business address (if different from section 1)**

*Street number and name:

*Suburb:

*State:

*Postcode:

Existing Wrap third party code:

Signature of nominated employee

Date:

Registration of employee(s) (continued)

ii. For an Accountancy Practice, a Legal Practice or a Mortgage Broking Practice (note: you can nominate more than one employee)

Use this section to nominate **one or more** employee(s) who your clients will authorise for third party access using the *Third Party Authority* form. These employees will only have access to view the accounts of clients who have authorised them by name.

You can nominate additional employee(s) as administration staff. They will have access to **all** authorised accounts across the company/firm (refer to section 3B).

	Employee 1	Employee 2	Employee 3
Please cross (X) :	<input type="checkbox"/> New <input type="checkbox"/> Update details <input type="checkbox"/> Remove	<input type="checkbox"/> New <input type="checkbox"/> Update details <input type="checkbox"/> Remove	<input type="checkbox"/> New <input type="checkbox"/> Update details <input type="checkbox"/> Remove
Occupation (please cross (X)):	<input type="checkbox"/> Accountant <input type="checkbox"/> Mortgage Broker <input type="checkbox"/> Lawyer	<input type="checkbox"/> Accountant <input type="checkbox"/> Mortgage Broker <input type="checkbox"/> Lawyer	<input type="checkbox"/> Accountant <input type="checkbox"/> Mortgage Broker <input type="checkbox"/> Lawyer
Title:			
*First name:			
*Surname:			
Date of birth:	/ /	/ /	/ /
*Email:			
Phone:			
Business address: (if different from section 1)			
Existing Wrap third party code:			
Signature:			
Date:	/ /	/ /	/ /

3B. Registering administration staff

Note: you can nominate more than one employee as administration staff.

Use this section to nominate **one or more** employee(s) as administration staff. They will have access to view **all** authorised client accounts across the company/firm.

	Employee 1	Employee 2	Employee 3
Please cross (X) :	<input type="checkbox"/> New <input type="checkbox"/> Update details <input type="checkbox"/> Remove	<input type="checkbox"/> New <input type="checkbox"/> Update details <input type="checkbox"/> Remove	<input type="checkbox"/> New <input type="checkbox"/> Update details <input type="checkbox"/> Remove
Title:			
*First name:			
*Surname:			
Date of birth:	/ /	/ /	/ /
*Email:			
Phone:			
Business address: (if different from section 1)			
Existing Wrap third party code:			
Signature:			
Date:	/ /	/ /	/ /

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Terms and conditions for online services

Background

1. Macquarie maintains and offers a facility by which users are able to access Macquarie software containing client data, by way of internet. This facility, which includes associated data, information and software owned by or licensed to Macquarie, is referred to throughout these conditions of use as "Macquarie Online". Macquarie agrees to allow you access to and use of Macquarie Online on the conditions of use below.
2. "Code" means any of the codes referred to in clause 2(a)(ii) and "codes" means all of them.
3. "Macquarie" refers to Macquarie Bank Limited, Macquarie Investment Management Limited, Macquarie Equities Limited and every other member of the Macquarie Group, their employees and agents.
4. "You" means any person or authorised agent, employee or officer of a company using Macquarie Online in conjunction with your codes with your authorisation.
5. When exercising a discretion, Macquarie will do so reasonably.

Conditions of use

1. You accept these conditions of use each time Macquarie Online is used in conjunction with your codes.
2. You agree:
 - a) to use Macquarie Online only if permitted by Macquarie:
 - i. for legitimate purposes, and
 - ii. in accordance with all personalised means of access, security codes and devices necessary to access Macquarie Online (including the Macquarie access code, user identifications, passwords and PINs) – which are collectively referred to as "codes".
 - b) not to interfere with or damage (or attempt to interfere or damage) any code, data or software associated with Macquarie Online
 - c) to keep confidential and secure any information or data obtained at any time by using Macquarie Online, and
 - d) to keep each code:
 - i. confidential and on the terms on which it is given to you by Macquarie, and
 - ii. secure against any improper or unauthorised use
 - e) that your obligations extend to both current and previous officers, employees and agents.
3. You will promptly notify Macquarie if:
 - a) you suspect that any person has gained access to your codes or is using your codes without your authorisation, or
 - b) you are in breach of any of these conditions of use.
4. You agree that any notice you are required or permitted to give under these conditions of use will be effective only if actually given by you to a Macquarie client services employee.
5. Macquarie will be entitled to assume that any user has your authority each time Macquarie Online is used in conjunction with your codes, except for any use occurring after you have given Macquarie notice to the contrary.
6. Anything associated with or available through Macquarie Online belongs to Macquarie or other third persons and is protected by intellectual property rights. You agree not to access, download or otherwise use such things other than as expressly permitted by these conditions of use. You accept full responsibility and you indemnify Macquarie for any expense, loss or liability incurred as a result of any unauthorised use by you of such things.
7. Macquarie will use reasonable efforts to provide (but does not warrant that it will provide):
 - a) access to Macquarie Online at all reasonable times, and
 - b) reliable data and information, to the extent that it is within its control. Macquarie takes no responsibility for the reliability of data and information outside its control.
8. Where you are given authority under this form to view client accounts online, you must tell us in writing if any of your staff members or agents no longer has authority to access Macquarie Online. If we have not been advised in writing that the staff member or agent no longer has such authority, that staff member or agent may still be able to access Macquarie Online, and you cannot claim that person is not acting for you until such notice is received by us.
9. Subject to conditions and warranties implied by legislation, Macquarie excludes:
 - a) liability for any delay, interruption or unavailability of Macquarie Online and for any inaccuracy or incompleteness of data provided by any person and available on Macquarie Online, and
 - b) all terms implied by statute, general law or custom except ones that may not be excluded. If Macquarie breaches any condition or warranty implied by legislation into a contract with a consumer, Macquarie limits its liability for that breach to a resupply of the goods or services in respect of which the breach occurred.
10. Macquarie reserves the right to:
 - a) change any of these conditions of use at any time and you agree to comply with those changes from the time you are notified (which may be by a notice on the Macquarie website or by any other form of notice), and
 - b) suspend or terminate use of Macquarie Online at any time and for any reason. Your right to use Macquarie Online is personal to you and cannot be assigned or transferred.

Please complete and return the form to **Macquarie Wrap, GPO Box 4045, Sydney NSW 2001**, or via email to **wrapsolutions@macquarie.com**.

If you have any queries about completing this form please contact us on **1800 025 063**.