

Individual 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 an individual 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. Each person you appoint must complete the associated declaration in Section 2.

You cannot use this form to appoint a Financial Services Professional or Company. Please use the Third party authority - Financial Services Company or Professional form.

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.

We do not monitor or enquire whether an individual remains your representative (e.g. employee) - please ensure their access is revoked if they no longer require that access.

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

You agree to terms and conditions for Macquarie's Electronic Banking services as referred to in your Account's relevant terms and conditions available from [macquarie.com/personal](https://www.macquarie.com/personal).


This form cannot be used to update account details, if you would like to update your details please contact us via live chat.

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 an individual, complete sections 1, 2 and 4**
- ▶ **To remove an individual, complete sections 1, 3 and 4**

 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**.

1. Your Macquarie account details

1.1 Account details

Account number:

Account name:

2. Individual Authority Details

2.1 Controlling parties (applicable to Unregulated Trusts only)

A. Are the controlling parties¹ beneficiaries?

No ► go to Section 2.2

Yes, are the controlling parties on the account related?²

No ► Continue to Section 2.2

Yes ► Continue to Section 2.2

2.2 First Individual

A. Authority being appointed for this individual, and the signing instructions required

View Authority³ Continue to section 2.2.C

Authorised Signatory – Sole Authorisation Continue to section 2.2.B

Authorised Signatory – Dual Authorisation Continue to section 2.2.B

Note that Authorised Signatory authority is only available for a signatory for a corporate entity, for guardianship, power of attorney and court order arrangements on the account.

Please note: Current account signing instructions will not be altered. If your CMA is set as “dual authority”, payments from the CMA to a Macquarie Credit Card will be processed with only one account holder approving.

B. Role being appointed for this individual, and additional documents required

Role	Additional documents/requirements
Director	If your beneficial owners have changed, please also complete the Beneficial Owner ID Form
Trustee	Provide a Certified Copy of the Trust Deed or Deed of Amendment
Attorney (under a Power of Attorney arrangement)	Provide Certified Copy of Power of Attorney
Guardian/administrator	Provide Certified Copy of Guardian/Administrator Order
Executor	Provide Certified Copy of Probate
Employee/representative	Only applicable to corporate entities
Other (e.g. spouse, family member)	Only applicable to Wrap Cash and Investment Accounts

C. First individual details

Appointed individual's full name:

Date of birth:

Are they an existing Customer?

Yes, Macquarie ID

► go to Section D

No, complete the Individual and Sole Traders ID Form or the FSC form, and provide the following information:

Email:

Mobile:

Source of net wealth (select one option only as the predominant source)

Business operations

Savings and employment

Superannuation

Investments

Inheritance/gift

Sale of a property or asset

Legal settlement

Foreign income

Occupation:

Industry:

1. Controlling parties are Trustees, Directors, Authorised Signatories, Owners, Court appointed Guardians, Administrators Secretaries and POAs which can independently operate the account.

2. Related means spouse or in a de facto relationship, grandparent, parent, child or sibling.

3. View Authority is not available on Vision Savings Accounts

2. Individual Authority Details

2.2 First Individual (continued)

D. First individual declaration

By completing this form, you, the appointed individual, accept the above information provided is correct and agree to be bound by the relevant Account's terms and conditions from macquarie.com.au.

Signature (Appointed individual)

Date:

2.3 Second Individual

A. Authority being appointed for this individual, and the signing instructions required

View Authority⁴ Continue to section 2.3.C

Authorised Signatory – Sole Authorisation Continue to section 2.3.B

Authorised Signatory – Dual Authorisation Continue to section 2.3.B

Note that Authorised Signatory authority is only available for a signatory for a corporate entity, for guardianship, power of attorney and court order arrangements on the account.

Please note: Current account signing instructions will not be altered. If your CMA is set as "dual authority", payments from the CMA to a Macquarie Credit Card will be processed with only one account holder approving.

B. Role being appointed for this individual, and additional documents required

Role	Additional documents/requirements
Director	If your beneficial owners have changed, please also complete the Beneficial Owner ID Form
Trustee	Provide a Certified Copy of the Trust Deed or Deed of Amendment
Attorney (under a Power of Attorney arrangement)	Provide Certified Copy of Power of Attorney
Guardian/administrator	Provide Certified Copy of Guardian/Administrator Order
Executor	Provide Certified Copy of Probate
Employee/representative	Only applicable to corporate entities
Other (e.g. spouse, family member)	Only applicable to Wrap Cash and Investment Accounts

C. Second individual details

Appointed individual's full name:

Date of birth:

Are they an existing Customer?

Yes, Macquarie ID

► **go to Section D**

No, complete the Individual and Sole Traders ID Form or the FSC form, and provide the following information:

Email:

Mobile:

Source of net wealth (select one option only as the predominant source)

Business operations

Savings and employment

Superannuation

Investments

Inheritance/gift

Sale of a property or asset

Legal settlement

Foreign income

Occupation:

Industry:

4. View Authority is not available on Vision Savings Accounts

2. Individual Authority Details

2.3 Second Individual (continued)

D. Second individual declaration

By completing this form, you, the appointed individual, accept the above information provided is correct and agree to be bound by the relevant Account's terms and conditions from [macquarie.com.au](https://www.macquarie.com.au).

Signature (Appointed individual)

Date:

3. Would you like to remove a Third Party Authority?

Name of individual/adviser to be removed:

- 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](https://www.macquarie.com.au/help) and search for 'Open Banking and the Consumer Data Right')
- Existing authorities will remain on your account if this section is not completed

4. Account holder declaration

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.
- where you are an attorney for an account holder, you declare that the appointment of any person as set out in section 2 does not constitute an appointment as a substitute, delegate or sub-attorney.

Signature 1:

Signature 2:

Name:

Name:

Date:

Date:

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.

Submit



Clients only email to transact@macquarie.com



Advisers only upload via Request Centre

Need Help?

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