



MACQUARIE BANK

Setup Active Banking access

Macquarie Bank Limited ABN 46 008 583 542 AFSL and Australian Credit Licence no. 237502

Use this form to create a new user to access your account(s) via Macquarie Active Banking. Please use black ink and mark boxes with an X.

Please see section 4 to learn more about user access levels.

Return this form by email to business@macquarie.com or mail to Client Administration: Macquarie Bank Limited, GPO Box 4294, Sydney NSW 1164.

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User details (ALL fields required)

Do you have a Macquarie Access Code? No Yes ▶ Macquarie Access Code

First and middle name(s)

Surname Common names (if different to above)

Company name

Date of birth (DDMMYYYY) Occupation

Residential address (cannot be a PO Box)

Street number and name

Suburb/town State: Postcode:

Delivery address (the password calculator (for authorisers) will be delivered by express post to this address)

Street number and name

Suburb/town State: Postcode:

Contact details

Mobile phone number (your password will be sent to this number)

Business phone contact

Email address

This form must contain an original signature(s) – digitally inserted signatures will not be accepted.

- The User hereby applies to access and use Macquarie Active Banking, subject to the Macquarie Active Banking Online Terms and Conditions ("T&C's").
- The T&C's operate alongside any applicable product terms (eg Product Disclosure Statement or loan agreement). When using Active Banking you must observe the T&C's which cover things like password and device security, authority to approve transactions, mistaken payments, and what can happen if you don't follow these requirements.
- You may review the T&C's upon your first use of Active Banking and subsequent use will be taken as acceptance and agreement.
- If your use of Active Banking requires a password generator token to login, you may be charged an Electronic Banking Token fee of \$65 for each token that needs to be issued to a user.

ELECTRONIC VERIFICATION OF IDENTITY

- You consent to Macquarie disclosing your personal information to our external third party service provider in order to verify your identity.
- You agree to the Macquarie Client Identity Verification Terms and Conditions

User signature

Date (DDMMYYYY)



IMPORTANT

Please complete the below questions and provide a certified copy of your Driver's License or Passport. Identification documents must have been certified within the last 12 months, at the time of acceptance by us.

Are you an Australian resident for tax purposes? No Yes

Are you a resident of another country for tax purposes? No Yes ▶ please complete the Individual Macquarie Identification form

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Nominate user access levels (required)

Choose one of the three options below:

- Copy account and access levels from an existing user ► *complete section A*
- Specify the accounts and access levels required for the user ► *complete section B*
- Copy existing user access plus specify additional access ► *complete sections A and B**

* Note: in the event of an inconsistency in the information you provide in Section A and Section B of this form, your instructions in Section B will be used.

SECTION A

COPY ACCOUNTS AND FACILITIES AND ACCESS LEVELS FROM AN EXISTING USER

Access details of existing user:

User name Macquarie Access Code

Is this user replacing the existing user nominated above?

- No
- Yes ► please note we will delete access to the Macquarie Access Code above

PASSWORD CALCULATOR (REQUIRED)

Do you want to transfer an existing password calculator to this user?

- No
- Yes ► Password calculator serial number

Please note we will delete access for the existing Macquarie Access Code that is linked to this calculator

SECTION B

NOMINATE USER ACCESS LEVELS (REQUIRED)

Please indicate which accounts and facilities are to be accessed and what level of access is required. List of access levels are in section 4.

	Account/Facility name	Enter Account/Facility number				Sole Auth	OR	Dual Auth
			View	Create	Down-load			
1	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
2	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
3	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
4	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
5	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
6	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
7	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
8	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
9	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>
10	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	OR	<input type="checkbox"/>

If you chose sole authorisation or dual authorisation above, do you wish to set a daily payment authorisation limit?

Please note if you choose a limit, it applies for all accounts and facilities under the user's access.

- No
- Yes ► Amount: \$

3 Authority (required)

This form must be signed by any one of the following:

- two directors or a director and a company secretary
- for a sole director/secretary company, the director/company secretary
- partnerships - any two partners
- authorised signatories as per the method of operation for all accounts/facilities which are to be accessed by the user.

This form must contain an original signature(s) – digitally inserted signatures will not be accepted.

Authorised signatory

Date (DDMMYYYY)

Print name

Your corporate title

Authorised signatory

Date (DDMMYYYY)

Print name

Your corporate title

4 Available Access Levels

View	Create	Download (for use with compatible software platforms)	Sole Authorise & Dual Authorise (this does not include create access)
<p>The user can:</p> <ul style="list-style-type: none"> • view account and transaction details only. 	<p>The user can:</p> <ul style="list-style-type: none"> • view account and transaction details • roll-over Term Deposits • update email addresses for term deposits • update TFN/ABN • update daytime contact number • update mobile number • switch to online statements • create transactions • request a bank cheque • stop cheque payments • initiate open and closure requests (these must then be authorised by the user/users who have authorisation access) 	<p>The user can:</p> <ul style="list-style-type: none"> • download account and transaction data via Macquarie Download files for use with compatible software platforms. <p>*NB – Download files may contain a group of accounts. Their setup can be discussed with your Relationship Manager.</p>	<p>The user can:</p> <ul style="list-style-type: none"> • authorise transactions and account openings and closures that have been created • Dual Authoriser can only authorise transactions and account openings and closures in conjunction with another authoriser. <p>*NB – A password calculator must be used to authorise payments</p>

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