



Macquarie Limited Third Party Authority

Macquarie Bank Limited ABN 46 008 583 542 AFSL 237502

PLEASE USE BLACK INK

This form can be used to allow your Financial Service Professional or Financial Service Company to establish a new Term Deposit in the same name as your existing CMA online or with the *Macquarie Bank Term Deposit Application – Limited Third Party Authority* form. Funds will be debited from your existing cash account.

! 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. It is important that you understand this risk and carefully consider what level of authority you give to them.

Please return all relevant forms by email to transact@macquarie.com

1 Your Macquarie account details

This authority will allow the adviser(s) and/or dealer groups selected in sections 3 and/or 4 to establish a new Term Deposit in the same name as your existing CMA (Term Deposit Opening Authority).

Please note: By signing this form you acknowledge that you have read the Macquarie Bank Term Deposit Product Information Statement.

Macquarie CMA account number:

Account name:

! Please ensure the account holder(s) provide current mobile and email in section 5, which is mandatory for Term Deposit opening.

2 Your adviser details and signature

Important information: by allowing your adviser authority to establish a new Term Deposit on your behalf, they will automatically be able to obtain information on all of these accounts. Please note: this will not replace the existing nominated adviser on your account, if you wish to change your adviser details please complete the *Change of Account Details* form.

Adviser name:

Adviser's company name:

Dealer code (if known):

Adviser code (if known):

Adviser signature:

! If you wish to appoint a second adviser with this authority please provide their details below.

Second adviser name:

Second adviser code:

Second adviser signature:

Please note: If more than one adviser has signed this form to be granted limited third party authority and is therefore able to establish a new Term Deposit on your behalf, the signing instructions will default to either to sign, that is, any one of the advisers appointed above may provide instructions to execute a transfer.

3

What is the name of the dealer group you wish to appoint?

Dealer group:

Please note: The signing instructions will be specified by the dealer group in accordance with 5.10 of the terms and conditions.

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Terms and conditions

General terms which apply to all levels of authority

- 5.1 Only you can appoint a third party to access or withdraw from your account(s).
- 5.2 If you appoint a third party to withdraw from your account they will automatically be able to enquire on your account also.
- 5.3 Withdrawals may be for any amount and may be made at varying intervals of time.
- 5.4 You:
- indemnify us against all loss, liabilities and costs incurred directly or indirectly as a result of the appointment of a third party
 - indemnify us against all loss, liabilities and costs incurred directly or indirectly in connection with any action by a third party under their appointment or any payment from your account on their instruction, and
 - release us from claims and liabilities in connection with any act or omission related to the appointment of a third party to your account.
- 5.5 However, we remain liable for any loss or liability which, by operation of law we cannot exclude.
- 5.6 This authority takes effect on the date that we amend our records to note the appointment and continues until you cancel it by telling us in writing. Cancellation also takes effect on the date that we amend our records to note the change.
- 5.7 We will notify you if we cancel the appointment of a third party.
- 5.8 We will cancel the authority given to a third party if we are notified of the death, bankruptcy or loss of capacity of either you or the third party.
- 5.9 Third parties can not set up Direct Debits on your account (other than for the purpose of establishing a new Macquarie Bank Term Deposit or adding funds to your Term Deposit at maturity) or give other third parties access or authority on your account.
- 5.10 You can revoke these authorities at any time by contacting us. We will update this in accordance with the signing instructions on your Account.
- If more than one to sign, a signed request will be required as per current process.
 - The contact centre will be responsible to verify the signing instructions.
 - Note – a signatory will not be able to remove another signatory/account holder.
- 5.11 Where you give authority to a company or firm:
- the company or firm will give us details of people who can provide instructions on its behalf
 - you acknowledge and agree that the company or firm may do this and the people they nominate can access your Account according to the authority you have given to them
 - we will only act on requests from the company or firm, if the person providing the instructions has been nominated by it in accordance with our procedures

- the company or firm must contact us if any nominated person no longer has authority. If you change adviser or cease using one, you should ensure you contact us immediately to cancel their authority. Otherwise, that person may still be able to operate your Account.

Terms relating to the level 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.
- 5.12 You agree to terms and conditions for Macquarie Online as set out in the relevant Product Information Statement available from macquarie.com.au.
- 5.13
- You authorise the third party to have access to information about your account
 - You do not authorise the third party to make any changes to your account details, close your account or enable use of any facilities including your cheque book.

Terms relating to term deposit opening authority

- 5.14 You agree to be bound by the terms and conditions set out in the Macquarie Bank Term Deposit Product Information Statement.
- 5.15 You authorise the company or firm to provide all required Term Deposit application details, including but not limited to the investment term, commission, and interest instructions.
- 5.16 You acknowledge the company or firm can elect up to 0.25% pa (GST inclusive) in trailing commission, and that this trailing commission will be deducted from the interest rate paid on your Term Deposit.
- 5.17 You acknowledge that any new Term Deposits will be established using the same details as your existing Macquarie Cash Management account. Details that may be replicated for your new Term Deposit include (but are not limited to) your residential and mailing address details, contact information, authorised signatory details, and Tax File Number(s) or ABN.
- 5.18 You acknowledge that by providing this authority, the adviser/dealer group you have nominated is empowered to open Term Deposit accounts on your behalf (and to add funds to an existing Term Deposit at maturity), and will be authorised to operate your account in accordance with section 11 of the terms and conditions, as detailed in the Macquarie Bank Term Deposit Product Information Statement.

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Signatures and declaration of CMA account holders

! 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. Please attach a copy of the account holder(s) Driver's License or Passport. The identification does not need to be certified.

For personal accounts, all account holders must sign. For company accounts two directors, a director and a secretary or a sole director must sign. Please note that the directors/secretary who signs must be existing account signatories. Forms that are not properly executed will result in processing delays.

On the terms of this authority document, I/we authorise the above adviser(s) and/or dealer group to have limited authority to establish a new Macquarie Bank Term Deposit on my/our behalf.

Signature of account holder 1

Date:

 / /

Title:

Full name:

! Mobile number (MANDATORY):

! Email (MANDATORY)

Signature of account holder 2

Date:

 / /

Title:

Full name:

! Mobile number (MANDATORY):

! Email (MANDATORY)

For more information, please visit help.macquarie.com or contact us on **1800 806 310**.