

# Third party authority

Use this form to nominate a third party authority (TPA) on your home loan and offset account(s).

Please scan and email the completed form and supporting documents to [clientservices@mortgageinfo.com.au](mailto:clientservices@mortgageinfo.com.au)

## 1. Your account(s)

List the account(s) you want to add or remove a TPA from:

1.

2.

3.

4.

5.

6.

## 2. Do you want to add or remove a TPA?

Add  Remove

## 3. TPA access level

- View** – this allows the TPA to access details about your account(s) online. The TPA will be issued an Access Code, if they don't have one, to be able to log in online.
- Transact** - (Not available for brokers/advisers) this allows the TPA to transact on your account(s) online. The TPA will be issued an Access Code, if they don't have one, to be able to log in online. NOTE: if the TPA does not have an existing Access Code, they will need to complete a Verification of Identity form and return this along with certified copies of their identification.

## 4. TPA's details

Full name

IFA/aggregator group (if they are your broker or financial advisor)

Access code (if applicable)

Occupation

D.O.B

Mobile

Residential address (no PO Box)

Email

## 5. Your acceptance

By signing below you acknowledge that:

- ▶ The TPA will not be granted access to your card (e.g. debit card) and one will not be issued to them. We may contact you to confirm transactions authorised by the TPA. This may delay the transaction.
- ▶ You will be liable for all transactions performed on the account(s) in accordance with your loan contract regardless of whether these transactions are performed by you or the TPA;
- ▶ You may cancel this TPA at any time by filling out this form and selecting 'remove' or by notifying us;
- ▶ We may place a stop on your account or cancel any authority you have given at any time:
  - if you or the TPA does not comply with the terms of this authority or the Terms and Conditions of your account(s); or
  - if a dispute arises between you and the TPA; or
  - if we receive notification of the death, bankruptcy or loss of capacity of you or the TPA; or
  - for any other reason in our discretion;
- ▶ We'll notify you if we cancel an authority you have given; and
- ▶ We won't be liable for any loss or damage suffered by you from us placing a stop on your account(s) or cancelling any authority you have given.

Note: All Borrowers / Account holders and authorised third parties must sign this form.

Borrower / Account holder 1

Borrower / Account holder 1 signature

Date

Borrower / Account holder 2

Borrower / Account holder 2 signature

Date

continued >

Borrower / Account holder 3

Borrower / Account holder 3 signature

Date  /  /

Borrower / Account holder 4

Borrower / Account holder 4 signature

Date  /  /

Borrower / Account holder 5

Borrower / Account holder 5 signature

Date  /  /

Borrower / Account holder 6

Borrower / Account holder 6 signature

Date  /  /

TPA name:

By signing below I acknowledge and agree that to the best of my knowledge, all information given in this form (including any attached documents) is true and correct and that any transactions will be in the best interest of the Borrower/ Account holder. I understand I am bound by the Privacy Statement (available at our website [macquarie.com.au](http://macquarie.com.au)) which describes the handling of my personal information.

TPA signature:

Date  /  /