

# THIRD-PARTY AUTHORITY FORM



## Part 1 - Third-party details

Full name	Company
Email	Role/relationship
Phone	ABN/ACN
Address	AFSL/Registration number

## Part 2 - Account(s)

Account number	Account name
Account number	Account name
Account number	Account name
Account number	Account name
Account number	Account name

## Part 3 - Authority

To make enquiries as it relates to the account(s) specified in Part 2 which may include portfolio values, investment details, beneficiaries and/or insurance policies.

Obtain documentation as it relates to the account(s) specified in Part 2, specifically the Product Disclosure Statement, Investment Menu, current advice fees and client report covering investment summary, transaction history and cash transactions.

To make enquiries and/or obtain documentation as per below:

## Part 4 - Declaration and Signatures

By signing this form, I/we:

- consent to and authorise Praemium to disclose to the person specified in Part 1 of the matter(s) specified in Part 3; and
- understand that the authority of the person specified in Part 1 will remain in place unless revoked in writing by me/us.

Signature

Print name

Capacity

Date

Signature

Print name

Capacity

Date

Please scan and email the completed form to [support@praemium.com.au](mailto:support@praemium.com.au) OR return via post to: SMA, PO Box 322, Collins St West 8007.

This form to be used in respect of Separately Managed Accounts (SMA), ARSN 114 818 530, which is issued by Praemium Australia Limited ("Responsible Entity") ABN 92 117 611 784 AFSL 297956 and Praemium SMA Superannuation Fund (Super), ABN 75 703 857 864 RSE R1074352, which is issued by Diversa Trustees Limited ("Trustee") ABN 49 006 421638 AFSL 235153 RSE Licence No L0000635.