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	Ac	count name	
Account number	Ac	count name	
Account number	Ac	count name	
Account number	Ac	count name	
Account number	Ac	count 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		Signature	
Print name		Print name	
Capacity	Date	Capacity Date	e

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