

# Macquarie transaction and savings accounts – third party authority form



Macquarie transaction and savings accounts are issued by Macquarie Bank Limited ABN 46 008 583 542, AFSL 237502.

Use this form to authorise a third party to have access to your Account(s) and to specify the level of authority you wish to give them. To remove a third party from your Account(s), please call us. If you hold your Account jointly with another person, this form must be completed and signed by both of you.

Please use black ink. Print in CAPITALS. Mark boxes with an [X] where applicable.

## 1 Your Macquarie Account details (to be completed by Account holder(s))

Account name:

Account number(s):

## 2 Authority type (to be completed by Account holder(s))

Please select the level of authority you wish to provide to your nominated third party for the Account(s) you listed in section 1:

**Enquiry authority**

You authorise a third party to access information about your Account(s). The third party cannot make withdrawals from your Account(s), update your Account details or close your Account(s).

**Authorised signatory authority**

You authorise a third party to have enquiry authority on your Account(s) as outlined above and, in addition, authorise the third party to make withdrawals and payments from your Account(s) using any method agreed in writing by us (including, without limitation, Electronic Banking), change details on your Account(s) and close your Account(s).

## 3 Third party authority terms and conditions

1. Only you may appoint a third party to access or withdraw from your Account(s).
2. If you appoint a third party to have authorised signatory authority on your Account(s) they will automatically have enquiry authority on your Account(s) as well.
3. You acknowledge that you cannot authorise a third party to use your Card and that we will not issue a Card to any third party appointed by you (or to any other person other than a joint Account holder).
4. You acknowledge and agree that we have the right to delay, or seek further information, before acting on any instructions purporting to be given by the nominated third party. However, we are not obliged to seek further information or make any enquires in connection with any such instruction. We may take any instruction purported to be given under the authority given to the third party on face value. We have the right to refuse to act on any instructions understood to be given under this appointment by you.
5. You can arrange to have the authority of any third party appointed by you revoked at any time by calling us.
6. This authority takes effect on the date when we amend our records to note the appointment of the third party and continues until either party provides written notice to cancel it. Cancellation takes effect on the date when we amend our records to note the change.
7. We may cancel the appointment of a third party as an authority on your Account(s), for example in situations where we become aware of the death, bankruptcy or loss of capacity of either you or the third party.
8. We may vary the terms of the authority by telling you in writing.

## Third party authority terms and conditions (continued)

9. You acknowledge and agree that you will be liable for any transactions made, or instructions given to us, by the third party nominated in this form to the time that their authority is cancelled, even though the transactions are debited to the Account(s) or the instructions are implemented after the time that the authority is cancelled. This includes, without limitation, future dated payments, periodical payments or cheques established or drawn by the third party prior to the cancellation of their authority.
10. You:
- indemnify us against all loss, liabilities and costs incurred directly or indirectly as the result of the appointment of the third party, or in connection with any actions (including withdrawals made from your Account(s)) on the third party's instruction
  - release us from all claims and liabilities in connection with any act or omission of the nominated third party to your Account(s), and
  - acknowledge where there is more than one Account holder, your liability is joint and several.
11. We remain liable for any loss or liability which:
- arises as a result of our negligence, or
  - by operation of law we cannot exclude.

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### Declaration and signature of Account holder(s)

By completing and signing this third party authority form, I/we (as applicable):

- acknowledge I/we have read, understood and accept the third party authority terms and conditions in section 3 of this third party authority form, and
- authorise the individual whose details and signature appear in section 5 below to have access to my/our Account(s) with the authority I/we have selected in section 2.

Signature:	<input type="text"/>	Signature:	<input type="text"/>
Date:	<input type="text" value="/ /"/>	Date:	<input type="text" value="/ /"/>
Name:	<input type="text"/>	Name:	<input type="text"/>
	<input type="text"/>		<input type="text"/>

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### Third party details

**This section is to be completed by the third party you are adding to your Account(s).**

Title:  Full given name(s):

Surname:  Date of birth:

Any other name you are known by (if applicable):

Mobile number:  Email address:

- !** By providing your contact details above, you consent to us sending you information relating to the Account(s) electronically.  
**● Note: Macquarie transaction and savings accounts are offered with electronic communication only.**

Occupation:

Residential address (cannot be a PO Box):

Suburb:  State:  Postcode:

Country:

Do you have a Macquarie Access Code (MAC)?  No  Yes, provide details:

## Third party details (continued)

### Declaration by third party

By signing below, I:

- agree that, to the best of my knowledge, all information given in this form (including any attached documents) is true and correct and that I will promptly notify Macquarie and provide any changes to the information provided by me
- acknowledge I have read, understood and accept the following documents (available at our website [macquarie.com.au](http://macquarie.com.au) or by calling 13 31 74):
  - Macquarie transaction and savings accounts terms and conditions
  - Macquarie transaction and savings accounts fees, limits and lodgement times, and
  - Macquarie electronic banking terms and conditions
- agree that I am bound by the Privacy Statement (found within the Macquarie transaction and savings accounts terms and conditions and available at our website [macquarie.com.au](http://macquarie.com.au)) which describes the handling of my personal information, including direct marketing and I understand that I can change my marketing preferences by visiting [macquarie.com.au/optout-bfs](http://macquarie.com.au/optout-bfs) or calling 13 31 74, and
- agree to provide Macquarie with any information that is reasonably required in order for Macquarie to meet its obligations under AML/CTF laws, FATCA and/or its internal policies and procedures.

### Signature

Date:  /  /

Full name:

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## Additional information to verify the identity of the authorised third party

As part of the appointment process, the identity of the authorised third party must be verified. The authorised third party is required to complete this step and send us a scanned certified copy of a document(s) which verifies their identity.

Please provide certified copies of:

- 1 x identification document from List A, or
- 1 x identification document from List B **AND** 1 x identification document from List C.

To confirm the authorised third party's identity, the documents provided need to match exactly with the details provided in this third party authority form, including the authorised third party's:

- full name (no initials)
- residential address
- date of birth.

### Choose 1 x identification document from List A

<b>List A identification documents</b>	<ul style="list-style-type: none"> <li>• Australian drivers licence or learner permit (current)</li> <li>• Australian passport (current or expired within the last 2 years)</li> <li>• International passport (current)</li> <li>• Proof of age card/NSW photo card (current and government issued)</li> </ul>
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OR

### Choose 1 x identification document from List B **AND** 1 x identification document from List C

<b>List B identification documents</b>	<ul style="list-style-type: none"> <li>• Australian birth certificate (not an extract)</li> <li>• Australian citizen certificate</li> </ul>
<b>List C identification documents</b>	<ul style="list-style-type: none"> <li>• Utility bill (less than 3 months old)</li> <li>• Council rates notice (less than 3 months old)</li> <li>• Taxation notice (less than 12 months old)</li> <li>• Centrelink statement (less than 12 months old)</li> <li>• Centrelink pension card (current and must show current address)</li> </ul>

When you and the third party have completed and signed this form, please email your scanned form and identification documents to [transact@macquarie.com](mailto:transact@macquarie.com)