

THIRD PARTY AUTHORITY FORM



This form allows a third party to be authorised to make enquiries and obtain information in relation to one or more Præmium account(s).

Important Information

By completing this form, the account holder consents to Præmium disclosing information relating to their account(s) to the nominated third party for enquiry and administrative purposes.

This authority is for information only and it does not permit the authorised third party to provide instructions, request transactions, make withdrawals, change bank details, amend fees, or alter account ownership unless expressly authorised under a separate form or arrangement. This authority applies to all current and future Præmium products and services held by the account holder(s).

Part 1 - Third party details

Full name	Organisation
Email	Role/relationship
Phone	ABN/ACN
Address	AFSL/Registration number
State	Postcode

Part 2 - Account(s)

Account Number	Account name
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Part 3 - Authority

The third party specified in Part 1 is authorised to make enquiries and obtain information relating to the account(s) specified in Part 2, including:

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 relevant disclosure documents, Investment Menu, current advice fees and client report covering investment summary, transaction history and cash transactions.

To enquire and/or obtain documentation as per below:

Part 4 – Account holder consent and declaration

By signing this form, I/we:

- consent to and authorise Praemium to disclose personal and account information to the third party specified in Part 1 in accordance with the authority set out in Part 3;
- acknowledge that the third party may request and receive information relating to my/our account(s);
- understand that this authority is limited to information access only and does not allow the third party to act on my/our behalf; and
- understand that this authority will remain in place unless and until it is revoked in writing by me/us.

I/We acknowledge that Praemium may rely on this authority until written notice of revocation is received and processed.

Signature of account holder 1

Date

Print name

Capacity

Signature of account holder 2

Date

Print name

Capacity

Signature of account holder 3

Date

Print name

Capacity

Signature of account holder 4

Date

Print name

Capacity

Part 5 – Important Information

Revocation of Authority

This authority may be revoked at any time by providing written notice to Praemium. Revocation will take effect once the request has been received and processed.

Privacy

Personal information provided in this form will be used and disclosed by Praemium in accordance with its Privacy Policy for the purposes of administering this authority.

Return this completed form to your Nominated Representative for upload or email to support@praemium.com.au

If using eSignatures, please submit this form to us via an approved provider. For further guidance, refer to the Adviser Help Centre.

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