

Third-party authorisation form

Please print in black or blue pen, in UPPERCASE.

This form allows you to give permission for a third party, such as a financial planner or your spouse, to access your REI Super account information. It is not applicable for death benefit claims. The form does not allow a third party to make changes to, transact or sign on your account or access your online account. If you want your representative to provide us with instructions on your behalf, you will need to give them formal power of attorney. You should talk to a solicitor or the public trustee in your state or territory for information about appointing a power of attorney. Please send your completed form to: **REI Super, PO Box 832 Newcastle, NSW 2300**

This authorisation will remain in place for a maximum of 2 years from the date you signed the form.

If you need help

Getting advice on your REI Super account is easy. Whether it's a simple check in to understand your options or comprehensive advice for you and your family, we have you covered. Contact us on **1300 13 44 33** to make an appointment with one of our advisors or learn more at reisuper.com.au/advice.

> PART 1: YOUR DETAILS

Member number

Account number (if known)

☐ Please apply this third-party authority to all my accounts

Given names

Surname

Date of Birth (DD-MM-YYYY)

Residential address

Suburb

State

Postcode

Postal address. If the same as your residential address, mark **X** in this box. ☐

Suburb

State

Postcode

Mobile phone

Home phone

Email

> PART 2: PROVIDE DETAILS OF THE THIRD-PARTY RELATIONSHIP

I wish to give another person access to my account:

☐ Financial Planner and support staff - Go to Step 2a.

☐ Personal or other Professional - Go to Step 2b.



Third-party authorisation form cont...

PART 2A: FINANCIAL PLANNER AND SUPPORT STAFF

You must list the full name of each person you are authorising to obtain information on your behalf about you superannuation with REI Super. To protect your privacy, information will only be provided to the individuals listed on this form.

If you would like to provide third-party authorisation to more than one person, please complete a new form for each person or attach a separate page with their details. If providing the details on a separate page, this must be on Company letterhead and signed and dated by the member.

I hereby provide third-party authorisation to the following person:

Authorised person's surname

Authorised person's given name

Company (if applicable)

This authority is for Only named individual Any representative of the organisation

FP authorised rep number AFSL number

Financial planner support staff (must be with the same company as any listed Financial Planner).

Address (if this is a company, this should be the registered business address)

Suburb State Postcode

Authorised person's mobile phone Authorised person's home phone

Authorised person's email

Authorised person's signature

PART 2B: PERSONAL OR OTHER PROFESSIONAL

Authorised person's surname

Authorised person's given name

Company (if applicable)

Relationship: Solicitor Accountant Other (e.g. spouse) — please advise:

Address (if this is a company, this should be the registered business address)

Suburb State Postcode

Authorised person's mobile phone Authorised person's home phone

Authorised person's email

Authorised person's signature

Third-party authorisation form cont...

▶ PART 3: ATTACH PROOF OF ID

You must provide proof of your identity when providing third party authorisation.

Please provide a copy of one of the following documents:

- Drivers licence, issued under Australian State or Territory law or equivalent authority of a foreign country for the purpose of driving a vehicle that contains your photograph
- Passport issued by the Commonwealth
- A passport or a similar document issued for the purpose of international travel, that:
 - Contains a photograph and your signature
 - Is issued by a foreign government, the United Nations or an agency of the United Nations; and
 - If it is written in a language other than English - it is to be accompanied by an English translation prepared by an accredited translator
- A card issued under a State or Territory law for the purposes of providing your age which contains your photograph a national identity card issued for the purpose of identification, that:
 - Contains a photograph and your signature
 - Is issued by a foreign government, the United Nations or an agency of the United Nations; and
 - If it is written in a language other than English - it is to be accompanied by an English translation prepared by an accredited translator.

Your Privacy

REI Super is administered by us along with our service provider, SS&C Bluedoor Pty Limited (SS&C). We collect, use and disclose personal information about you in order to manage your superannuation benefits and give you information about your super. We may also use it to supply you with information about the other products and services offered by us and our related companies.

If you do not wish to receive marketing material, please contact us on **1300 13 44 33**. Our Privacy Policies are available to view at reisuper.com.au/privacypolicy or you can obtain a copy by contacting us on **1300 13 44 33**.

If you do not provide the personal information requested, we may not be able to manage your superannuation. We may sometimes collect information about you from third parties such as your employer, a previous super fund, your financial adviser, our related entities and publicly available sources. We may disclose your information to various organisations in order to manage your super, including your employer,

our professional advisers, insurers, our related companies which provide services or products relevant to the provision of your super, any relevant government authority that requires your personal information to be disclosed, and our other service providers used to assist with managing your super.

In managing your super your personal information will be disclosed to service providers in another country, most likely to SS&C's processing centre in India. Our Privacy Policies list all other relevant offshore locations. Our Privacy Policies set out in more detail how we deal with your personal information and who you can talk to if you wish to access and seek correction of the information we hold about you. It also provides detail about how you may lodge a complaint about the way we have dealt with your information and how that complaint will be handled.

If you have any other queries in relation to privacy issues, you may contact us on **1300 13 44 33** or write to our Privacy Officer, **PO Box 832, Newcastle NSW 2300**.

▶ PART 4: DECLARATION

- I authorise the named person(s) in this form to request and receive information in relation to my REI Super account(s).
- I understand this authority will apply for 18 months from the date of my signature unless cancelled or changed by me before then.
- I understand that this authority does not allow the Authorised Representative to change my details or carry out any transaction on my behalf.
- By completing this form, any previous adviser nomination will be removed from my account(s) and that nominated Financial Adviser will no longer have access to my information.
- I can revoke my authority at any time before the end of the 2 year period.
- Any AFSL provided for a financial adviser must be valid. If it lapses, this third party authority will be void.
- I acknowledge that REI Super and its representatives are not responsible for any loss and/or liabilities which may result from REI Super or its representatives providing information to my nominated representative.
- I consent to my personal information being collected, disclosed and used as described in the **Privacy Collection Statement**.

Member Signature

X

Date

/ /

▶ READY TO SEND US YOUR FORM?

Once you have completed and signed this form, please either:

Post: REI Super, PO Box 832, Newcastle NSW 2300

Email: admin@reisuper.com.au

▶ WE'RE HERE TO HELP

If you need any assistance with filling out this form, or have any questions about super, please feel free to call us on **1300 13 44 33**.

