

# CFS Edge Iress Open integration consent form

SAVE FORM

PRINT FORM

This form can be used by the Licensee to provide consent for your Xplan Adviser Site to be set up and enabled for integration with the CFS Edge platform using the Iress Open service.

Please email the completed form to [csregistration@cfs.com.au](mailto:csregistration@cfs.com.au)

Telephone (for assistance) 1300 769 619.

## ADVISER SITE DETAILS

Adviser Site name

Adviser Site URL

Xplan Licence Holder

By providing your consent, CFS will request the above named Adviser Site be set up and enabled for integration with the CFS Edge platform using the Iress Open service.

The Xplan Licence Holder or their authorised representative acknowledges and agrees that it:

- 1 is permitted and has the necessary authorisation to execute this consent;
- 2 complies with the *Privacy Act 1988 (Cth)* and the Australian Privacy Principles as amended from time to time (Privacy Law);
- 3 has collected and holds, or will collect and hold, the necessary consent and permission in accordance with Privacy Law prior to sharing the end customer's Personal Information as defined under Privacy Law (PI) to CFS from the Adviser Site to CFS Edge via the integration;
- 4 consents to the access and transfer of PI facilitated by Iress Open from the Adviser Site to CFS;
- 5 understands that refresh tokens used in each Adviser authentication process of the integration are stored in Tapico's secure environment which is a part of the managed service that Tapico/FNZ provides to CFS. Iress is not responsible for how CFS and Tapico (or any Third Party Integrator) stores or otherwise uses such token nor the security of the environment; and
- 6 is integrated at Adviser Site level. That is:
  - a all users of the Adviser Site (with appropriate capabilities and permissions for the Client data) can use the integration; and
  - b where the Adviser Site is a Centralised Sites which may have multiple Advisers or Adviser practices, all Adviser and Adviser practices on the Centralised Site can use the integration.

Signature

Print name

Position

Date

## DEFINITIONS

<b>Adviser Site</b>	Means each Adviser's hosted Xplan Site or Centralised Site as nominated and notified by the Customer to CFS from time to time from which Transfer Data will be extracted and authorised by the applicable Xplan Licence Holder in accordance with clause 2 of this form. 'Centralised Site' and 'Xplan Licence Holder' are defined below.
<b>Centralised Site</b>	Means a centralised Xplan site offered by a licensee group to multiple advisers.
<b>CFS Edge</b>	CFS Edge is a CFS adviser portal which includes functionality for account onboarding.
<b>Transfer Data</b>	Xplan Client entity data: name, address, contact details.
<b>Xplan Licence Holder</b>	Means the person or entity that holds the Xplan licence to the Xplan site.