

CFS Edge

Third party user registration form

SAVE FORM

PRINT FORM

This form can be used to set up new financial representatives on the CFS Edge platform. To request access to a client's account, please complete the *CFS Edge Third party access request form*.

This form is not to be used for setting up advisers. To set up a new adviser, please complete the *CFS Authorised representative registration form* instead. Once the Licensee and adviser are registered to use CFS Edge, complete the *CFS Edge Change of adviser form* with the client to be assigned to their account(s).

Mark appropriate answer boxes with a cross like the following ☒. Start at the left of each answer space and leave a gap between words. All fields marked with an asterisk (*) are mandatory and are required for us to complete your request.

Please return the completed form to the adviser or client who can upload the request to the Document Library via CFS Edge.

Telephone (for assistance) 1300 769 619

SECTION 1 FINANCIAL REPRESENTATIVE INFORMATION

*Which of the following best describes your business (please select one):

☐ SMSF administrator

☐ Accountant

☐ Lawyer

☐ Adviser

*If adviser, please provide your ASIC ID number

☐ Other

If other, please provide details

*Organisation name

*ABN/ACN

SECTION 2 USER DETAILS

*Title Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

*Date of birth

*Given name(s)

*Surname

*Mobile number

Business number

*Email address

SECTION 3 DECLARATION AND SIGNATURE OF AUTHORISED SIGNATORIES

I/we declare and agree:

- the details provided are true and correct;
- to receive electronic communications where an email address has been provided;
- to be bound by the Terms and Conditions attached;
- I have not been given notice by Colonial First State (CFS) that I am not to be registered with CFS; and
- to my/our information being used in accordance with the CFS privacy policy which can be accessed online at cfs.com.au/privacy.

To be signed by at least one partner or signatory of the business.

Signature of Authorised Signatory 1

Print name

Position

Date

Signature of Authorised Signatory 2

Print name

Position

Date

TERMS AND CONDITIONS

By registering as a third party user, you agree to the following Terms and Conditions:

- 'you' or 'your' means the authorised signatories, and all other users accessing the platform in conjunction with your authorisation; and
- we maintain and offer a facility by which users are able to access software containing client data online. This facility, which includes associated data, information and software owned or licensed to us, is referred to throughout these Terms and Conditions of use as the 'platform'. We agree to allow you access to and use of the platform on the Conditions of Use below.

Conditions of Use

By registering as a third party user, you agree to the following Conditions of Use:

- use the platform only in accordance with these Terms and Conditions;
- use the platform only to access information you are properly authorised to access by the client(s);
- notify us immediately if you believe that the security of your username or password have been compromised or if the platform has been accessed by an unauthorised person;
- use information that you obtain by using the platform only for lawful purposes;
- tell us if your contact details change;
- we may permit anyone to use the platform provided they use a valid username and password, whether such use was authorised by you or not;
- any instructions for using the platform provided to you or posted on the platform from time to time, form part of these Terms and Conditions;

- we may amend these Terms and Conditions at any time by posting the amended Terms and Conditions on the platform;
- we will take all reasonable steps to ensure that the information which you access by using the platform is accurate and up-to-date;
- we make no warranty that the use or operation of the platform will be uninterrupted or error-free or that the platform is suitable for any particular purpose or has any performance, functionality or security features except as we are required to provide by law;
- we are not liable for, and you indemnify us, in respect of all claims arising in relation to use of the platform, your username and password otherwise than in accordance with these Terms and Conditions;
- to the extent permitted by law, our liability is limited to resupplying the platform services;
- keep confidential and secure any information or data obtained at any time by you from the platform;
- your obligations extend to current and previous users that you have provided access to;
- we will be entitled to assume that any user has your authority each time the platform is used in conjunction with your third party ID and login details that you have created and change from time to time; and
- we reserve the right to:
 - amend the Terms and Conditions at any time
 - revoke your access to the platform at any time.