THIS IS AN INTERACTIVE FORM

# CFS Edge Third party access request

SAVE FORM

#### **PRINT FORM**

This form can be used to assign a new financial representative (third party user) with access to your CFS Edge account(s). The financial third party user will have access to information relating to you and your account(s), including transaction history, reports, and statements. Please note that providing them access does NOT authorise them to edit your information, edit your account details, or initiate transactions on your behalf.

Mark appropriate answer boxes with a cross like the following |X|. 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 upload the completed form to the Document Library via our online portal. Telephone (for assistance) 1300 769 619

### **SECTION 1** THIRD PARTY USER DETAILS

Before we can assign a new third party user access to your account(s), the user must be registered with CFS Edge. To register, the financial representative will need to complete the CFS Edge Third party user registration form.

\*Third party name

\*Third party email address

# SECTION 2 ACCOUNT DETAILS

*Account number	*Account name
Account number	Account name
Account number	Account name
Account number	Account name

If access is required for more than four accounts, please provide additional account instructions on a separate page.

# SECTION 3 CLIENT(S) DECLARATION/SIGNATURE

I/We understand that by signing this form I/we are authorising the third party user named above to access my/our account(s). **Note:** All account signatories are required to sign, provide their name, and date this section.

Name

Account Signatory 1 signature

Account Signatory 2 signature

Date
dd/mm/yyyy
au/ mm/ yyyy
Name
Date
dd/mm/yyyy
Name
Date
dd/mm/yyyy
uu/ mm/ yyyy
Name
Date

Account Signatory 3 signature

Account Signatory 4 signature

Avanteos Investments Limited ABN 20 096 259 979, AFSL 245531 (AIL) is the trustee of the 'Avanteos Superannuation Trust' ABN 38 876 896 681 and issuer of CFS Edge Super and Pension. Colonial First State Investments Limited ABN 98 002 348 352, AFSL 232468 (CFSIL) is the Investor Directed Portfolio Service operator, administrator and custodian of 'Avanteos Wrap Account Service' which include CFS Edge Investments. 29554/FS8120/1223