

# 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 . 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.

Account Signatory 1 signature

Name

Date

Account Signatory 2 signature

Name

Date

Account Signatory 3 signature

Name

Date

Account Signatory 4 signature

Name

Date