

# Third party authority

## Advisers

**Important information**

This form can be emailed to: [au.service@resolutionlife.com.au](mailto:au.service@resolutionlife.com.au)

**Please note**

The following authority only allows for the provision of such things as account information, balances, component / investment break-ups etc (either over the phone or in writing). It does not extend to the ability for the third party to make changes on the account such as a change of address or change of beneficiary, to transact on the account, or to be provided with nominated account details (if applicable). If you wish for the third party to have greater powers, you should formally set up a 'Power of Attorney' in conjunction with this authority (for over the phone enquiries).

**Section 1 – Details of account/policy owner(s) granting authority (if account/policy is held in joint names, a and b need to be completed)****a – Account owner**

Title      Mr      Mrs      Miss      Ms      Other

Surname

Full given name(s)

Date of birth (DD/MM/YYYY)

Email address

Postal address held by Resolution Life

	State	Postcode

**b – Joint account owner**

Title      Mr      Mrs      Miss      Ms      Other

Surname

Full given name(s)

Date of birth (DD/MM/YYYY)

Email address

Postal address held by Resolution Life

	State	Postcode

**Section 2 – Policies/accounts on which information can be provided**

Product

Account or client numbers\*

Please tick this box if you wish for this authority to extend to any other Savings and Investments accounts/products held in your name, which are not recorded above.

\* Depending on the type of product the member has, this may be referred to as a policy, member, account, contract or client number.

### Section 3 – Details of the authorised third party adviser

Name

Business/company address

	State	Postcode

Mobile/contact number

ABN or AFSL number

This authority is to also extend to other office staff acting on my behalf

### Section 4 – Resolution Life's Privacy Policy

Our privacy policy contains information on how we collect, use and disclose your personal information, as well as other important information on how we deal with privacy. Visit [resolutionlife.com.au/privacy](https://resolutionlife.com.au/privacy) for a copy.

### Section 5 – Limitations/Restrictions/Expiry date (if applicable)

Any limitations, restrictions or expiry date (you may wish to impose on this authority) should be detailed below. The absence of any details will imply that this authority is to remain in place until further notice.

Limitations/Restrictions

Expiry date (dd/mm/yyyy)

a) Signature of account owner

Date (dd/mm/yyyy)

Signature of authorised third party

Date (dd/mm/yyyy)

X
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X
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b) Signature of joint account owner

Date (dd/mm/yyyy)

X
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### What you should know

Colonial First State Investments Limited ABN 98 002 348 352, AFSL No. 232468 (CFSIL) is the responsible entity of the Commonwealth Investment Funds (Funds). Resolution Life Services Australia Pty Ltd ABN 49 631 346 391 (Resolution Life), on behalf of CFSIL, is the administrator of the Funds. The information contained in this document is factual information only and it does not contain any financial product advice or make any recommendations about a financial product or service being right for you. Commonwealth Financial Services is a registered business name of CFSIL. Resolution Life can be contacted via [resolutionlife.com.au/contact-us](https://resolutionlife.com.au/contact-us) or by calling 133 731.