

# Third party authority

**Important information**

**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).

## 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/policy owner**

Title  Date of birth

Given name(s)

Surname

Postal address held by Resolution Life

Suburb  State  Postcode

Country

Email address

**B. Joint account/policy owner**

Title  Date of birth

Given name(s)

Surname

Postal address held by Resolution Life

Suburb  State  Postcode

Country

Email address

## 2. Policies/accounts on which information can be provided

| Product              | Account or client numbers <sup>1</sup> |
|----------------------|--|
| <input type="text"/> | <input type="text"/>                   |
| <input type="text"/> | <input type="text"/>                   |
| <input type="text"/> | <input type="text"/>                   |
| <input type="text"/> | <input type="text"/>                   |

Please cross  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.

<sup>1</sup> Depending on the type of product the member has, this may be referred to as a policy, member, account, contract or client number.

### 3. Details of the authorised third party adviser

Given name(s)

Surname

Business/company address

  

Suburb

State

Postcode

Country

Mobile/contact number

ABN or AFSL number

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

### 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.

### 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

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

a. Signature of account/policy<sup>1</sup> owner

Date

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

b. Signature of joint account/policy<sup>1</sup> owner

Date

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

Signature of authorised third party

Date

|   |   |   |   |   |   |   |   |
|---|---|---|---|---|---|---|---|
| D | D | M | M | Y | Y | Y | Y |
|---|---|---|---|---|---|---|---|

### Where to send this form

Email this completed form to:

[au.service@resolutionlife.com.au](mailto:au.service@resolutionlife.com.au)

<sup>1</sup> Depending on the type of product the member has, this may be referred to as a policy, member, account, contract or client number.

#### What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is the issuer of this product.

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. Resolution Life is part of the Resolution Life Group and can be contacted via [resolutionlife.com.au/contact-us](https://resolutionlife.com.au/contact-us) or by calling 133 731.