

How to have a Power of Attorney added to a policy

So that we can action your request, you need to provide the necessary documentation. This helps prevent fraudulent activity on your account and is required under certain laws

STEP 1

Print or make a copy of the original Power of Attorney. Make sure you copy both sides and include all pages.

STEP 2

The copy of your Power of Attorney needs to be certified by one of the people listed over the page. They will need to sight the original documentation to complete this request.

STEP 3

The certifier can certify the photocopy of your Power of Attorney by placing a stamp or writing 'This is a true and correct copy of the original' followed by their signature, printed name, qualification and the date.

The certifier **MUST** either:

- a. Repeat the above on each page; or
- b. Make reference to the total number of pages being certified on the front page and then proceed to initial, date and note each page number on each subsequent page.

STEP 4

All legal representatives noted on the Power of Attorney must also provide a copy of their own certified identification.

Please refer to the enclosed flyer 'How to confirm your identity' for the correct process.

STEP 5

Send the certified copy of the Power of Attorney with the certified identification to the postal address listed on the email you have received. We can only accept certified documents that have a certifier's original ink signature on them. Please don't email your documentation.

Once the documentation has been verified, as a Power of Attorney, you will be able to obtain specific policy information.

We may be restricted from providing some information over the phone, however, a written request signed by the attorney/s can be submitted and we will respond to the query, noting that any policy changes or transactions must be sent in writing.

Persons who can certify documents

A person who is currently licensed or registered under a law to practise in one of the following occupations:

- Chiropractor
- Medical practitioner
- Patent attorney
- Psychologist
- Dentist
- Nurse
- Pharmacist
- Trademarks attorney
- Legal practitioner
- Optometrist
- Physiotherapist
- Veterinary surgeon.

A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described) or a person who is in the following list:

- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- An officer with, or a credit representative of, a holder of an Australian Credit Licence (ACL), having two or more years of continuous service with one or more licensees
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having two or more years of continuous service with one or more licensees
- Australian Consular Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Consul-General
 - b. Consul
 - c. Vice-Consul
 - d. Trade Representative
 - e. Consular Agent
- Australian Diplomatic Officer, within the meaning of the Consular Fees Act 1955. This includes a person appointed to hold or act in any of the following offices of the Commonwealth (of Australia) in a country or place outside Australia:
 - a. Ambassador
 - b. High Commissioner
 - c. Minister
 - d. Head of a Mission
 - e. Commissioner
 - f. Charge d'Affaires
 - g. Counsellor, Secretary or Attache at an Embassy, High Commissioner's office, Legation or similar
- Bailiff
- Bank officer with two or more continuous years of service
- Building society officer with two or more years of continuous service
- Chief executive officer of a Commonwealth court
- Clerk of a court
- Commissioner for Affidavits
- Commissioner for Declarations
- Credit union officer with two or more years of continuous service
- Employee of the Australian Trade and Investments Commission who is:
 - a. in a country or place outside Australia and
 - b. authorised under paragraph 3 (d) of the Consular Fees Act 1955 and
 - c. exercising his or her function in that place.
- Employee of the Commonwealth who is:
 - a. in a country or place outside Australia and
 - b. authorised under paragraph 3 (c) of the Consular Fees Act 1955 and
 - c. exercising his or her function in that place.
- Fellow of the National Tax Accountants' Association
- Finance company officer with two or more years of continuous service
- Holder of a statutory office not specified in another item in this list
- Judge of a court
- Justice of the Peace
- Magistrate
- Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
- Master of a court
- Member of Chartered Secretaries Australia
- Member of Engineers Australia, other than at the grade of student
- Member of the Association of Taxation and Management Accountants
- Member of the Australasian Institute of Mining and Metallurgy
- Member of the Australian Defence Force who is:
 - a. an officer or
 - b. a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with two or more years of continuous service or
 - c. a warrant officer within the meaning of that Act
- Member of the Institute of Chartered Accountants in Australia, the Australian Society of Certified Practising Accountants or the Institute of Public Accountants
- Member of:
 - a. the Parliament of the Commonwealth or
 - b. the Parliament of a State or
 - c. a Territory legislature or
 - d. a local government authority of a State or Territory
- Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
- Notary public
- Permanent employee of:
 - a. the Commonwealth or a Commonwealth authority or
 - b. a State or Territory or a State or Territory authority or
 - c. a local government authority or
 - d. With two or more years of continuous service and the person is not already specified in another item on this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Police officer
- Registrar, or Deputy Registrar, of a court
- Senior Executive Service employee of:
 - a. The Commonwealth or a Commonwealth authority or
 - b. a State or Territory or a State or Territory authority
- Sheriff
- Sheriff's officer
- Teacher employed on a full-time basis at a school or tertiary education institution.

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