



When to use this form

 Please complete this form if you wish to nominate a third party, such as an Adviser, an accountant or a spouse to have access to your account information.

A Third Party Authority (TPA) only allows a nominated person to request information on your account. They cannot transact on your behalf.

 A TPA will only be valid for 12 months from the date of receipt and you can only renew it by completing a new form.

Complete in blue or black ink using BLOCK letters. This request will be invalid if not signed and dated. Please return this completed form to: Club Plus Super Administration, Locked Bag 5007, Parramatta NSW 2124.

Section 1: Personal details

| | | | |
|------------------------------------|---|----------------------|--|
| Title: Mr/Mrs/Ms/Miss/Other | Member number: (if you have more than one account, please advise all member numbers this authority applies to) | | |
| <input type="text"/> | <input type="text"/> | | |
| Surname: | Given name(s): | | |
| <input type="text"/> | <input type="text"/> | | |
| Address: | | | |
| <input type="text"/> | | | |
| Suburb | State | Postcode | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Phone number: | Mobile number: | | |
| <input type="text"/> | <input type="text"/> | | |
| Email: | Date of birth (DD/MM/YYYY): | | |
| <input type="text"/> | <input type="text" value="/ /"/> | | |

Section 2: Third Party's details

| | | | |
|--|--------------------------|----------------------|----------------------------------|
| Name: (person 1) | | | |
| <input type="text"/> | | | |
| Business name: (if applicable) | | | |
| <input type="text"/> | | | |
| Address: | | | |
| <input type="text"/> | | | |
| Suburb | State | Postcode | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Contact number: | Email (optional): | | |
| <input type="text"/> | <input type="text"/> | | |
| What is your relationship to the nominated person/s? | | | |
| Personal relationship: (spouse, family member, friend) | | | |
| Professional relationship: (business representative who is providing you with personal advice or assisting you with your finances) | | | |
| Authorised third party signature: | | | Date (DD/MM/YY): |
| <input type="text"/> | | | <input type="text" value="/ /"/> |

Third Party Authority (cont.)

Section 2: Third Party's details (cont.)

Name: (person 2 - if required)

Business name: (if applicable)

Address:

Suburb

State

Postcode

Contact number:

Email (optional):

What is your relationship to the nominated person/s?

Personal relationship: (spouse, family member, friend)

Professional relationship: (business representative who is providing you with personal advice or assisting you with your finances)

Authorised third party signature:

Date (DD/MM/YY):

Section 3: Proof of identity

Please attach a Certified copy of one of the documents listed in section 6.

Note: To protect your privacy, this Third Party Authority will not be accepted without proof of your identity.

Section 4: Member's consent

I authorise the nominated person/s to receive any information or documentation in relation to my Club Plus Super account.

I authorise _____ to receive (please specify)

Member's signature:

Date (DD/MM/YY):

Section 5: Privacy

The personal information provided on this form is collected by and held for Club Plus Super by the fund administrator Australian Administration Services (AAS) in accordance with the Australian Privacy Principles of the *Privacy Act 1988 (Cth)*, for the purpose of administering accounts and providing services associated with your membership of the Fund.

You should read the *Privacy Policy* at clubplussuper.com.au/privacy-policy before completing the form. Call us on **1800 680 627** for a hard copy of the Policy. The Policy contains information about how personal information is collected, used and disclosed, how you can correct your personal information, make a complaint about a privacy breach and other important information about safeguards in place to protect your personal information.

By providing your information, you acknowledge that you have read and understood the *Privacy Policy*.

Third Party Authority (cont.)

Section 6: Proof of identity

All proof of age or identity documentation must be **CERTIFIED** copies of the original (refer example below). The following documents may be used.

EITHER:

One of the following documents only:

- driver's licence issued under state or territory law; or
- passport.

OR

One of the following documents:

- birth certificate or birth extract;
- citizenship certificate issued by the Commonwealth;
- pension card issued by Centrelink that entitles the person to financial benefits.

AND

One of the following documents:

- letter from Centrelink regarding a government assistance payment;
- notice issued by federal, state or territory government or local council the past twelve months that contains your name and residential address.
For example:
 - Notice of an ATO assessment
 - Rates notice from a local council

Certification of personal documents

All copied pages of ORIGINAL proof of identification documents (including any linking documents) need to be certified as true copies by any individual approved to do so (see below).

The following are some of the people who can certify copies of your originals as true and correct copies:

- Dentist
- Nurse
- Pharmacist
- Medical Practitioner
- Chiropractor
- Physiotherapist
- Psychologist
- Veterinary surgeon
- Optometrist
- Police Officer
- Justice of the Peace
- Engineer
- Accountant
- Teacher
- Judge or Magistrate
- Australia Post employee
- Bank, building society or credit union employee

If you can't access any of these people, the full list of who can certify documents is available at clubplussuper.com.au/otherforms

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you will need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

| Purpose | Suitable linking documents |
|-----------------------------------|---|
| Change of name | Marriage certificate, deed poll or change of name certificate from the Births, Deaths and Marriages Registration Office |
| Signed on behalf of the applicant | Guardianship papers or Power of Attorney |

Example of how to certify identification

Step 1: Take a photocopy of both sides of the original document (see list of documents)

Step 2: Take the photocopy and the original document(s) to an authorised person.

Step 3: The authorised person should state on the front side of each copy:

'This is a true and correct copy of the original.'

The authorised person should write on each copy their:

- full name;
- qualification (from list above);
- registration number (if applicable);
- date; and
- signature.



Contact us

member hotline: 1800 680 627
 email: member@clubplussuper.com.au
 website: clubplussuper.com.au

Club Plus Superannuation Pty Limited ABN 26 003 217 990, AFSL No. 245362
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