

Macquarie Vision Account group set up form



Use this form to link your accounts together for consolidated reporting.

Please note: This form will only group accounts for reporting on the Vision Adviser portal, these groups will not flow through to the Vision Client portal.

1

Group name

Please provide a group name for reporting purposes eg. The Jones' Family

2

Details of all accounts

Please complete the details of all the accounts you wish to include in this group.

Account name

1. Macquarie will accept an original, fax or email copy of the completed form.

2. Retain a copy for your records.

3. Send this form to:

Macquarie Vision

Fax: 1800 025 175

Email: vision@macquarie.com

If you have any queries about completing this form please contact us on 1800 300 163.