

Support staff registration

Use this form to register as a Support Staff for Macquarie Products and Services and obtain access to Adviser Online. All fields are mandatory unless indicated otherwise.

1. Dealer information

Dealer / Licence details

Dealer name:

AFSL number:

2. Employer information

Business name**For outsourced support staff only**

Please provide the name of the outsourcing provider you are employed through:

3. Support staff details

Macquarie ID (if known):**Full name and date of birth**

All names provided must be your legal full name

Title:

First name:

Middle name(s):

Surname:

Any other name known by:

Date of birth:

Residential address

For staff based outside of Australia, please include your overseas address

Street number and name:

City/Suburb:

State/Province/Region:

Postal code:

Country:

Mailing address

Please tick if same as residential address

Street number and name:

City/Suburb:

State/Territory:

Postal code:

Country:

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281. Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496. Macquarie Bank Limited ABN 46 008 583 542 AFSL 237502 is the issuer of the Macquarie Cash Management Account (CMA), Macquarie Consolidator Cash Account (Cash Account) and Macquarie Wrap Cash Account (Wrap Cash Account).

Contact details

Mobile number:

Business number:

Email address:

4. Identity Verification

Australian Drivers Licence

State of Issue:

Licence number:

Card number **(mandatory)**:

If you do not have an Australian Drivers licence or if you are based outside of Australia

- Please provide a **certified copy** of your ID. We can accept:
 - Passport
 - Proof of age card
 - Other valid government issued ID in your country
- Please refer to the **Certification standards** and **Authorised certifiers in a foreign country** at our **Adviser Help Centre**

5. Product selection

Please select which products you would like to be registered for:

Macquarie Cash

Macquarie Online Trading

Macquarie Wrap



If you select Macquarie Online Trading or Macquarie Wrap, you will also be set up for Macquarie Cash. Where no product is selected you will be registered for Macquarie Cash.

6. Access details

Please use this section to nominate the adviser details and level of access required for the Support staff in section 3.



For joint or shared adviser codes, all advisers must sign. For corporate adviser codes, a servicing adviser must sign (and include their name).

Enquiry: Provides online view access and the ability to initiate a cash payment for a client. This level will be granted for Macquarie Cash.

Limited Transact: Provides online view access and the ability to generate investment transactions (which require authorisation by an individual with Transact authority).

Transact: Provides online view access and the ability to generate and authorise investment transactions (only allowed for staff based in Australia).

Advisers

Adviser 1 name

Adviser 2 name

Apply to all my adviser codes, OR

Apply to all my adviser codes, OR

Apply to the following codes only

Apply to the following codes only

Level of authority

if no authority selected we will assume Enquiry

Macquarie Wrap:

Enquiry

Limited transact

Transact

Macquarie Wrap:

Enquiry

Limited transact

Transact

Macquarie Online Trading:

Enquiry

Transact

Macquarie Online Trading:

Enquiry

Transact

Adviser signature

Adviser signature

Date

Date

Advisers

Adviser 3 name

Adviser 4 name

Apply to all my adviser codes, OR
Apply to the following codes only

Apply to all my adviser codes, OR
Apply to the following codes only

Level of authority

if no authority selected we will
assume Enquiry

Macquarie Wrap:

Enquiry
Limited transact
Transact

Macquarie Wrap:

Enquiry
Limited transact
Transact

Macquarie Online Trading:

Enquiry
Transact

Macquarie Online Trading:

Enquiry
Transact

Adviser signature

Adviser signature

Date

Date

7. Declaration and signature

Before accessing Adviser Online you should carefully read the Adviser Online Terms and Conditions available on our website at [macquarie.com.au/site/adviser-online/terms-and-conditions](https://www.macquarie.com.au/site/adviser-online/terms-and-conditions). Signing this form will constitute your agreement to the Adviser Online Terms and Conditions.

This section is to be signed by the Support Staff whose details have been provided in section 3 of the form.

By signing this section, I confirm that:

- I have read and agree to be bound by the terms and conditions set out on our website at [macquarie.com.au/site/adviser-online/terms-and-conditions](https://www.macquarie.com.au/site/adviser-online/terms-and-conditions)
- I must not provide advice unless I am properly authorised to do so
- I must not share the details of my Macquarie ID with any other person as set out in the Adviser Online terms and conditions
- I agree to the Macquarie Group Privacy Policy available on [macquarie.com.au](https://www.macquarie.com.au) and for my identity to be verified electronically using government sources and information held by credit reporting agencies, such as Equifax. Go to [macquarie.com.au/everyday-banking/macquarie-client-identity-verification](https://www.macquarie.com.au/everyday-banking/macquarie-client-identity-verification) to learn more.

Signature

Name

Date

Sign Wet signature, or Electronic signature from an approved provider.

Visit Adviser Help Centre to view our requirements.

SubmitEmail to adviser@macquarie.com

Need Help?

For more information, please visit [Adviser Help Centre](#).