Use this form to link Premium Portfolio Service Accounts together for consolidated reporting.

Macquarie Private Wealth
Premium Portfolio Service
Account group set-up form

MACQUARIE

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281
Macquarie Superannuation Fund ABN 65 508 799 106 RSE R1004496

Please note: If you nominate to link your accounts to other accounts (account grouping), any third party nominated by a member of the account group to have ClientView access to their account, will also have access to the consolidated reporting of the whole group as well as the individual reports for each member of the group.

Complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS.
Mark answer boxes with a cross (X). Start at the left of each answer space and leave a one box gap between words.

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	Account numbers	**Account holder signature(s)** I agree for all accounts shown here to be linked to the account group mentioned above for the purposes of consolidated reporting.	Adviser signature and date
	Wrap account number Wrap cash account number		/ /
	Wrap account number Wrap cash account number		/ /
	Wrap account number Wrap cash account number		/ /
	Wrap account number Wrap cash account number		/ /
	Wrap account number Wrap cash account number		/ /

1. Please ensure your client(s) sign this form.
2. Macquarie will accept an original, fax or email copy of the completed form.
3. Retain a copy for your records.
4. Send this form to:
   Premium Portfolio Service
   GPO Box 4045
   Sydney NSW 2001 (please affix a stamp).
   Fax: 1800 025 175
   Email: mpps@macquarie.com.au

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

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