

Macquarie Transaction and Savings Accounts – Executor/Power of Attorney (POA) Form



Macquarie transaction and savings accounts are issued by Macquarie Bank Limited ABN 46 008 583 542, AFSL 237502.

Use this form to nominate an Executor, Power of Attorney (POA) or Enduring Power of Attorney (EPOA) as an authorised third party to view and transact on your account. Please note that you can not nominate a third party to transact on your account without a valid and active Executor, POA or EPOA.

Please consider carefully who you appoint as a third party authority on your accounts. By completing this form, you authorise a third party to access information about your Account(s) and, in addition, authorise the third party to make withdrawals and payments from your Account(s) using any method in writing by us (including, without limitation, Electronic Banking), change details on your Account(s) and close your Account(s). It is important that you understand this risk and carefully consider the access that you will be providing to the third party.

If you hold your Account jointly with another person, this form must be completed and signed by both of you. To remove a third party from your Account(s), please call us.

Please use black ink. Print in CAPITALS. Mark boxes with an [X] where applicable.

1 Your Macquarie Account details (to be completed by Account holder(s))

Account name:

Account number(s):

2 Transact access for third party terms and conditions

1. Only you may appoint a third party to access or withdraw from your Account(s).
2. If you appoint a third party to transact on your Account(s) they will automatically have view access on your Account(s) as well.
3. You acknowledge that you cannot authorise a third party to use your Card and that we will not issue a Card to any third party appointed by you (or to any other person other than a joint Account holder).
4. You acknowledge and agree that we have the right to delay, or seek further information, before acting on any instructions purporting to be given by the nominated third party. However, we are not obliged to seek further information or make any enquires in connection with any such instruction. Acting reasonably, we may refuse to act on an instruction understood to be given under this appointment by you, if we reasonably believe that acting on that instruction creates a risk of loss to you.
5. You can arrange to have the authority of any third party appointed by you revoked at any time by calling us at 13 31 74.
6. This authority takes effect on the date when we amend our records to note the appointment of the third party and continues until either party provides notice to cancel it. Cancellation takes effect on the date when we amend our records to note the change.
7. We may cancel the appointment of a third party as an authority on your Account(s) at any time:
 - a. If you or the third party does not comply with the terms of this authority or the Terms and Conditions listed below in section 4; or
 - b. If a dispute arises between you and the third party; or
 - c. If we receive notification of the death, bankruptcy, or loss of capacity of you or the third party; or
 - d. For any other reason in our discretion.We will act reasonably in relation to any decision to cancel the appointment of a third party.
8. You acknowledge and agree that you are liable for any instructions given to us, by the third party nominated in this form to the time that their authority is cancelled. This includes, future dated payments and periodical payments established by the third party prior to the cancellation of their authority.
9. We won't be liable for any loss or damage suffered by you from us cancelling any authority you have given.
10. You are responsible for any loss or damage incurred as a result of the appointment of the third party, or in connection with any actions taken on the third party's instruction.
11. We remain liable for any loss or liability which:
 - a. arises as a result of our mistake, error, fraud, negligence or wilful misconduct; or
 - b. by operation of law we cannot exclude.

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Declaration and signature of Account holder(s)

By completing and signing this third party authority form, I/we (as applicable):

- acknowledge I/we have read, understood and accept the third party authority terms and conditions in section 2 of this third party authority form, and
- authorise the individual whose details and signature appear in section 4 below to have transact access to my/our Account(s)

Signature:

Signature:

Date:

 / /

Date:

 / /

Name:

Name:

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Third party details

This section is to be completed by the third party you are adding to your Account(s).

Title: Full given name(s):

Surname: Date of birth: / /

Any other name you are known by (if applicable):

Mobile number: Email address:

! By providing your contact details above, you consent to us sending you information relating to the Account(s) electronically.

● Note: Macquarie transaction and savings accounts are offered with electronic communication only.

Occupation:

Residential address (cannot be a PO Box):

Suburb: State: Postcode:

Country:

How have you accumulated your wealth?

Savings from employment Superannuation Foreign income Inheritance/gift Investments

Declaration by third party

By signing below, I:

- agree that, to the best of my knowledge, all information given in this form (including any attached documents) is true and correct and that I will promptly notify Macquarie and provide any changes to the information provided by me
- acknowledge I have read, understood and accept the following documents (available at our website macquarie.com.au):
 - Macquarie transaction and savings accounts terms and conditions
 - Macquarie electronic banking terms and conditions
 - Macquarie privacy statement
- agree that I am bound by the Privacy Statement (available at our website) which describes the handling of my personal information, including direct marketing and I understand that I can change my marketing preferences by visiting macquarie.com.au/optout-bfs or calling 13 31 74, and
- agree to provide Macquarie with any information that is reasonably required in order for Macquarie to meet its obligations under AML/CTF laws, FATCA and/or its internal policies and procedures.

Signature

Date: / /

Full name:

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Additional information to verify the identity of the third party

As part of the appointment process, the identity of the authorised third party must be verified. This can be done in one of two ways, please select which method the third party will like to take to verify their identity:

- Provide a MAC**
The authorised third party can complete Electronic Verification by applying for a Macquarie Transaction Account via Macquarie Online Banking. Once successfully registered to Macquarie Online Banking, please provide the MAC of the authorised third party:

MAC of Authorised Third Party:

OR

- Send identification documents to Macquarie**
The authorised third party will need to send us a scanned certified copy of the following document(s) which verifies their identity:

- 1 x identification document from List A, or
- 1 x identification document from List B **AND** 1 x identification document from List C.

To confirm the authorised third party's identity, the documents provided need to match exactly with the details provided in this third party authority form, including the authorised third party's:

- full name (no initials)
- residential address
- date of birth.

Choose 1 x identification document from List A

List A identification documents	<ul style="list-style-type: none"> • Australian drivers licence or learner permit (current) • Australian passport (current or expired within the last 2 years) • International passport (current) • Proof of age card (current and government issued in Australia)
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OR

Choose 1 x identification document from List B AND 1 x identification document from List C

List B identification documents	<ul style="list-style-type: none"> • Australian birth certificate • Australian citizenship certificate • Health Care Card or Pensioners Concession Card issued by Services Australia
List C identification documents	<ul style="list-style-type: none"> • Utility bill (less than 3 months old) • Council rates notice (less than 3 months old) • Taxation notice (less than 12 months old) • Centrelink statement (less than 12 months old)

Please email your completed form, a certified copy of a statutory document (e.g. the POA document) and any identification documents to transact@macquarie.com.

A certified copy of a statutory document is required as this is a legally executed document which appoints a person to act as a legal personal representative. The certification must:

- include certifier's name, signature, date & title (e.g. financial adviser, judge, magistrate, justice of the peace, chartered accountant or police officer).
- be certified within the last 12 months, at the time of acceptance by us.