MACQUARIE

Adviser registration form

Use this form to:

- register to provide advice relating to Macquarie products and services
- register as a Financial Services professional
- obtain access to another adviser's clients or a corporate adviser code.

This will provide you with access to Macquarie Online.

If you wish to register support staff please refer to the Support staff registration form.

Please return this form via email to **adviser@macquarie.com** and retain a copy for your records.

1. Adviser information

Macquarie ID (if known):

Title:

Given name(s):

Surname:

Any other name known by:

Please select how you would like to be registered:

☐ Financial Adviser (Individual)

☐ Financial Adviser (Corporate), name of entity:

☐ Other Financial Services Professional (ie Accountant)

☐ Access to another adviser's clients or a corporate adviser code

Your details

All fields marked with a red asterisk (*) are mandatory.

*Date of birth:

*Email address:

*Mobile number:

Business number:

Business name:

1. Adviser information (Continued)

***Office address (can't be a PO Box)**

Street number and name:

Suburb:

State:

Postcode:

Is your mailing address the same? ☐ Yes ☐ No, please complete the below

Mailing address

Street number and name:

Suburb:

State:

Postcode:

If you are registering for access to another adviser's clients or a corporate adviser code ▶ ***go to section 4***

⚠ **All below fields are mandatory**

Electronic Verification

I have attached a certified copy of my government identification

☐ No ▶ ***please complete the below*** ☐ Yes ▶ ***go to section 2***

Government Identification Details (This is for verification purposes only)

ID type (Drivers Licence, Passport, Proof of Age):

Licence/Document number:

State of Issue (if using a passport, input Country of Issue):

Drivers licence card number (Only if present on ID):

Residential address

Street number and name:

Suburb:

State:

Postcode:

2. Dealer information

If your Dealer/Licensee is not registered with Macquarie, they can register by completing the *Dealer Registration* form.

⚠ **All below fields are mandatory**

Dealer name:

Dealer code:

Does your company hold an Australian Financial Services Licence (AFSL) number?

☐ No ☐ Yes, AFSL number:

AFSL name (if different):

⚠ **For AFSL representatives who do not hold an ASIC Authorised Representative Number, please attach a letter of authority from your licence holder.**

3. Product selection

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

☐ All products ☐ Macquarie Cash ☐ Macquarie Wrap

If you select Macquarie Wrap, you will also be set up for Macquarie Cash.

4. Access to another adviser's clients

Please use this section to nominate the adviser details and level of access required for the individual in section 1.

Levels of authority:

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.

If you do not make a selection, Enquiry level will be granted.

Adviser 1

Adviser name:

☐ Apply to all my adviser codes

OR

☐ Apply to the following codes only

Level of authority

Macquarie Wrap:

☐ Enquiry ☐ Limited transact ☐ Transact

Existing adviser signature

Date:

Adviser 2

Adviser name:

☐ Apply to all my adviser codes

OR

☐ Apply to the following codes only

Level of authority

Macquarie Wrap:

☐ Enquiry ☐ Limited transact ☐ Transact

Existing adviser signature

Date:

5. Declaration and signature

This section is to be signed by the adviser or financial services professional whose details have been provided in section 1 of the form.

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**.

These Terms and Conditions must be read together with the **Macquarie Banking Terms and Conditions** (**Banking T&Cs**). The Banking T&Cs govern your use of Adviser Online including any payments you make or instructions you submit on behalf of your Clients in relation to Cash Hub Accounts. You can also use Adviser Online to access other Macquarie Products and submit investment instructions for them – in doing so, we will communicate instructions to and from the relevant product issuer.

By signing this section, I confirm that:

- I agree to the **Adviser Online Terms and Conditions** and the **Macquarie Banking Terms and Conditions**
- I agree to the Macquarie Group Privacy Policy available on **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** to learn more.

Signature:

Date:

Name:

Sign

Wet signature, or

Electronic signature from an approved provider.

Visit Adviser Help Centre to view our requirements.

Submit

Email to **adviser@macquarie.com**

Need Help?

For more information, please visit **Adviser Help Centre**.

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