

Third party authority form



Save time, go online!

You can now complete this form online. Simply log in to your online account at unisuper.com.au and navigate to the Manage Account page.

IMPORTANT INFORMATION

This form allows you to authorise us to provide information about your UniSuper account to the person(s) you nominate, such as:

- your accountant
- your financial adviser
- your guardian
- your spouse or a family member
- your union representative, or
- the Public Trustee.

By signing this form you authorise the nominated person(s) to have access to information about your UniSuper account for a period of 24 months from the date this form is signed. The authority won't take effect until we've received your completed form.

The nominated person(s) won't be authorised to change your personal contact details, give any instructions or make any transactions on your behalf, including switching investment options, making contributions, requesting a rollover or making lump-sum withdrawals. Personal information such as your TFN and financial institution account details won't be released to the nominated person(s) under any circumstances.

You can cancel your authority at any time before the end of the 24 month period by calling us on **1800 331 685** or providing written notice to the Trustee by emailing enquiry@unisuper.com.au. Your request will generally take one to three business days to be processed, and the cancellation will only take effect from the date it's been processed.

SECTION 1 MEMBER DETAILS

➤ Please complete in BLACK or BLUE BALL POINT PEN and print in CAPITAL LETTERS. Cross (X) where required.

Member number

Title

☐ Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐ Other

Surname

Given name(s)

This includes your first name and middle name(s).

Date of birth (DD/MM/YYYY)

If you've changed your personal details (i.e. residential address and email address) since you last contacted us, please update your details by either:

- logging in to your account at unisuper.com.au
- completing a *Change of details form - super members* or a *Change of details form - pension members* (available from unisuper.com.au)
- calling us on **1800 331 685**.

What number can we call you on if we have a question regarding this form?

Daytime contact number



SECTION 2 THIRD PARTY DETAILS

Title	☐ Mr ☐ Mrs ☐ Ms ☐ Dr ☐ Professor ☐ Other
Surname	
Given name	
Company or business name (if nominated person is your accountant or financial adviser)	
	☐ I authorise UniSuper to release information about my UniSuper account to any representative of the nominated company or business.
Daytime contact number	
Email address	
If you provide an email address, we'll send a confirmation to the nominated third party.	
Signature of nominated person	Date
	DD MM YYYY
Relationship to member (select one box)	
☐ accountant	☐ spouse or family member
☐ financial adviser - AFSL*	☐ union representative
☐ guardian	☐ other (please specify)
☐ the Public Trustee	

* You must provide an Australian Financial Services Licence (AFSL) number if you choose financial adviser.

Did you know

You have access to expert UniSuper financial advisers who can help with managing your retirement savings.

You can get over-the-phone advice or meet with an adviser in person for a more comprehensive discussion about your finances.

Call UniSuper Advice on **1800 823 842** or head to **unisuper.com.au/advice** to find out more.

UniSuper Advice is operated by UniSuper Management Pty Ltd ABN 91 006 961 799 (USM), which is licensed to provide financial product advice. USM is also the administrator of the fund UniSuper ABN 91 385 943 850 (UniSuper). UniSuper Limited (ABN 54 006 027 121) is the trustee of UniSuper (ABN 91 385 943 850).

SECTION 3

MEMBER DECLARATION AND SIGNATURE

➤ Please read this declaration before you sign and date your form.

- I declare that the information I have provided on this form is true and correct.
- I authorise UniSuper to release information about my UniSuper account to the person nominated in SECTION 2 of this form and to any representative of the nominated company or business, if I've authorised this in SECTION 2.
- I acknowledge that:
 - this authority will remain in effect for a period of **24 months** from the date I sign this form unless revoked by me on an earlier date.
 - I can revoke my authority at any time before the end of the **24 month** period by calling or providing notice in writing to UniSuper, and
 - if this authority expires then my nominated third party will not be able to obtain information about my account until a new authority has been provided to UniSuper.
- I understand that this authority will not allow the nominated person to change my personal details or carry out any transactions on my behalf.
- UniSuper can cancel this authority for any reason, including when UniSuper is notified that an AFSL for the relevant financial adviser or their business is suspended or cancelled.
- I acknowledge that UniSuper is not responsible for any loss or delay which results from UniSuper providing information to my nominee.
- I agree to release, discharge and indemnify UniSuper from and against all action, claims, demands, expenses and liabilities which I suffer or which are suffered by or brought against UniSuper as a result of any information released to the nominated person by UniSuper.
- I acknowledge that I have read and understood UniSuper's Privacy Policy available at unisuper.com.au/privacy and I consent to my personal information being used in accordance with UniSuper's Privacy Policy.

Signature

Date

DD	MM	YYYY

Return your form

You can return your form and any supporting documents electronically using the [Upload a document tool](#) at unisuper.com.au/contact-us, or by post to Level 1, 385 Bourke Street, Melbourne VIC 3000.

PRIVACY STATEMENT

UniSuper is committed to protecting your personal information in accordance with privacy law obligations. The information that you provide on this form is collected and used in accordance with our Privacy Policy which can be found online at unisuper.com.au/privacy. If you have any privacy related questions, call **1800 331 685**.

Need help?

If you need further information:

- call us on **1800 331 685**, or
- visit unisuper.com.au/contact-us for more options - including chat.