



Select CMA

Issued by Westpac Banking Corporation | Managed by DDH Graham Limited

Appointing / Changing a Financial Adviser



Please complete form in BLACK INK using CAPITAL letters.

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ACCOUNT DETAILS

PLEASE SUPPLY CERTIFIED ID WITH THIS FORM.

Full account name

Account number

Postal address

Post code

Phone (business hours)

Mobile

Phone (after hours)

Fax

Email address

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YOUR FINANCIAL ADVISER'S DETAILS

Financial Adviser name

Company name

Company address

Post code

Contact name

Phone (business hours)

Mobile

Fax

Email address

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YOUR FINANCIAL ADVISER'S LEVEL OF AUTHORITY

Tick one of the following boxes. (If no box is ticked, your Financial Adviser will be given Standard Adviser Authority.)

Full Authority: This enables your Financial Adviser (and its authorised officers) to:

- authorise all withdrawals from your Select CMA;
- make changes to your account (including closing your account); and
- you are liable for all transactions incurred by the adviser or firm using your account.

Standard Adviser Authority: This enables your Financial Adviser (and its authorised officers) to:

- establish for you Select TDs linked to your Select CMA;
- authorise withdrawals from your Select CMA to your Nominated Accounts or Select TDs linked to your Select CMA;
- give maturity instructions regarding any Select TDs linked to your Select CMA;
- reduce the amount of any existing regular payment from your Select CMA; and
- obtain information regarding your Select CMA and any linked Select TDs.

Fee Authority: This enables your Financial Adviser (and its authorised officers) to:

- do anything which is permitted by Standard Adviser Authority;
- authorise withdrawals from your Select CMA in order to pay its fees.

Tax Authority: This enables your Financial Adviser (and its authorised officers) to:

- do anything which is permitted by Standard Adviser Authority;
- authorise withdrawals from your Select CMA in order to make payments to the Australian Taxation Office.

Enquiry Authority: This only enables your Financial Adviser (and its authorised officers) to obtain information regarding your Select CMA and any linked Select TDs.

Financial Adviser's signature

Name

Date

Financial Adviser's signature

Name

Date

Where your Financial Adviser is a company or firm, or stockbroker as your Authorised Signatory and that Financial Adviser or stockbroker is a company or firm, you agree that we may accept instructions from any relevant authorised officer of the Financial Adviser or stockbroker.

To the fullest extent permitted by law, by signing this form the financial adviser agrees to indemnify and save Westpac Banking Corporation and DDH Graham Limited from and against any claim, loss, demand or damage sustained or incurred by them directly or indirectly consequential on acting on instructions given by the financial adviser which are outside the authority conferred on them by the holder of the Select CMA(s).

If you are signing this form on behalf of a company or firm, you represent and warrant that you are authorised to sign this form on that company or firm's behalf.

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DECLARATION AND SIGNATURE OF ACCOUNT HOLDER/S

I/We declare that the information provided in this form is true and correct and that I am/we are authorised to sign this document on behalf of the account holder. By signing this form, I/we acknowledge that I/we have received, read and understood the Select CMA Terms and Conditions and confirm that I/we and the Financial Adviser agree to be bound by the Select CMA Terms and Conditions. In particular:

- I/we confirm that the Financial Adviser is authorised to act on my/our behalf in relation to my/our Select CMA and to provide Westpac Banking Corporation or DDH Graham Limited with instructions in accordance with the Select CMA Terms and Conditions and the level of authority specified above and I/we agree to be bound by all instructions given by the Financial Adviser in accordance with the level of authority specified above as if those instructions had come from me/us; and
- I/we understand that DDH Graham Limited and Westpac Banking Corporation collect, use and disclose personal information as provided in their collection statements and in accordance with their Privacy Policies which are available at www.ddhgraham.com.au and www.westpac.com.au

Please note this authority will automatically revoke any existing authority with another Financial Adviser and will automatically replace any existing authority given to the same Financial Adviser.

Signature

Name

Date

Individual

Director

Sole Director

Other (please specify)

Signature

Name

Date

Individual

Director

Other (please specify)