

AMP Cash Management Service – Add or Remove Delegate Transaction Authority

In this document Authorised Financial Adviser means an adviser authorised under one or more AMP Cash Management Service – Adviser Transaction Authority documents to transact clients’ accounts.

Use this form to delegate your authority, as an Authorised Financial Adviser, to transact on a client’s accounts using the AMP Cash Management Service (ACMS). The delegation will be for the same level of access on the same account(s) as the authority held by the delegating Authorised Financial Adviser.

Please complete separate forms for each delegate to be added or removed.

Please print in CAPITAL LETTERS and place a cross in any applicable boxes.

1. Delegating authorised financial adviser details

Surname

Given name(s)

Email

AMP Sales ID

Practice name

Contact phone number

2. Delegate details

By selecting ‘Add Access’ below, I am appointing the person named below as my delegate (Nominated Delegate):

Surname

Given name(s)

Add Access or Remove Access

Complete only if the delegate is being added:

- YES** – the delegate has previously provided AMP Bank with the information required to verify his/her identity for the purposes of ACMS Adviser Transaction Authority.
- NO** – the delegate has not previously provided AMP Bank with the information required to verify his/her identity for the purposes of ACMS Adviser Transaction Authority.

If **NO** – please also complete an AMP Cash Management Service – Identification Verification for Advisers or Delegates form. Return all forms and supporting documents AMP Bank, Reply Paid 79702, PARRAMATTA NSW 2124.

3. Privacy Collection Statement

Privacy Collection Notice:

We collect personal information of the nominated delegates named in this form to process your request to add, change or remove a transaction authority on a client's account. If you do not wish to provide personal information via this form, we will not be able to process your application.

We are required or authorised to collect this personal information under various laws including those relating to taxation and Anti-Money Laundering and Counter-Terrorism Financing Laws.

Some of the entities we might share your personal information with are listed in our privacy policy, and include:

- other members of the AMP group and external service providers that we need to deal with for the purposes described above
- courts, tribunals or government agencies as required by law or regulations
- persons or third parties authorised by you (including others named in this application), or if required or permitted by law.

Some external service providers we need to deal with can be located or host information outside Australia. A list of countries where these providers may be located can be obtained via our Privacy Policy.

Personal information is treated in accordance with the AMP Privacy Policy, which sets out how to access or update your personal information. It also contain information on how you can make a complaint about a breach or potential breach of our privacy obligations, and how we deal with such a complaint. You can view our Privacy Policy online at amp.com.au/privacy or contact us on 13 30 30 for a copy.

4. Signatures

By signing below I declare and agree as follows:

- I delegate the authority vested in me by my clients under an AMP Cash Management Service – Adviser Transaction Authority, to view and transact on those clients' accounts, to the Nominated Delegate;
- I instruct AMP Bank to add, the Nominated Delegate, to operate the accounts of any of my clients who have completed an **AMP Cash Management Service – Adviser Transaction Authority form** naming me as an Authorised Financial Adviser on their accounts;
- I instruct AMP Bank to remove access where specified to the person named in section 2 and I agree that I remain responsible for all acts and omissions of this person in relation to clients' accounts until such time as AMP Bank has notified me that it has activated the removal of the delegation;
- The Nominated Delegate is my agent and acts for and on my behalf for the purpose of viewing and transacting on clients' AMP Bank accounts or in any act or omission to act in connection with their delegated authority;
- I am responsible and liable for all actions and omissions of the Nominated Delegate in relation to, or arising from, or in connection with this delegation, as if they were my own actions and omissions;
- I indemnify and keep safe AMP Bank against any loss or damage suffered by AMP Bank or any other person in relation to the actions or omissions of a person who is, or was at any time, a Nominated Delegate in relation to, or arising from, or in connection with their delegated authority; and
- I warrant that the information in this AMP Cash Management Service – Add or Remove Delegate Transaction Authority form is accurate and complete.

Signature of Authorised Financial Adviser

Date

Name of Authorised Financial Adviser

Signature of Nominated Delegate

Date

Name of Nominated Delegate