Vanguard®

# Authorisation to provide account information

Complete this form to allow Vanguard to provide information about your Vanguard Personal Investor Account to the business representative you nominate. This could be a financial adviser, solicitor, accountant or other third-party business representative.

By completing this form, you're authorising the nominated business representative to have access to information about your Vanguard Personal Investor Account. This business representative will only receive information about your account – they will not be able to make changes or undertake any actions in your account on your behalf. You can also use this form to remove a third-party authority.

**Important:** Authorisation is valid for two years from the date this form is signed.

Please ensure that you provide a copy of this signed form to your nominated representative as a copy of the signed form is required to be provided to Vanguard with each request for information about your Vanguard Personal Investor Account.

**Questions?**
Call 1300 655 101 (Australia)
Call (+61) 3 8888 3888 (Overseas)

Vanguard Client Services are available from 8am to 6pm Monday to Friday (Melbourne time)

Please complete this form in blue or black pen using **CAPITAL** letters.

**Section 1.** Account details (must be completed)

| Account number | Contact phone number |
|---|---|
| | |

Investor name

**Need help?**
Call us on 1300 655 101 or visit www.vanguard.com.au.
Vanguard Investments Australia Ltd (ABN 72 072 881 086 AFS Licence 227263).

## **Section 2.** Nominated business representative (must be completed)

Full name of representative

Relationship/role (i.e. your financial adviser, solicitor, accountant)

Company name (if applicable)

Postal address

Email address

Business hours phone number

Mobile phone number

### Practicing staff details

| Name | Email |
|---|---|
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## **Section 3.** Remove nominated business representative

☐ I/We wish to remove this representative.

Full name of representative

Relationship/role (i.e. your financial adviser, solicitor, accountant)

Company name (if applicable)

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**Section 4.** Declaration (must be completed)

By signing this form you are confirming that you are authorised to provide us with these instructions and you declare that:

- I/ We authorise Vanguard to provide the nominated business representative(s) above with information about my Vanguard Personal Investor account or authorise Vanguard to remove the representative previously nominated to receive information about my Vanguard Personal Investor Account;
- I/We understand that Vanguard Personal Investor may do some checks to confirm the identity of the representative nominated above prior to disclosing any information;
- I/We understand that this authority will remain in effect for two years from the date this form is signed; and
- I/ We understand that the latest version of the Vanguard Privacy Policy and Privacy Collection Statement is available online at https://www.vanguard.com.au/personal/en/privacy.

| Authorised signatory 1 | Authorised signatory 2 |
|---|---|
| Signature<br>✗ | Signature<br>✗ |
| Name | Name |
| Date (DD/MM/YYYY)<br>/ / | Date (DD/MM/YYYY)<br>/ / |
| Position (please select one)<br>☐ Investor ☐ Director ☐ Trustee<br>Other (please specify) | Position (please select one)<br>☐ Investor ☐ Director ☐ Trustee<br>Other (please specify) |

**What's next?**

**Email**
Please submit the completed form to thirdpartycontact@vanguard.com.au

**Important:** A valid copy of this signed form must be provided to Vanguard with each request for account information by the nominated business representative.



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