

Authorised persons form



Mason Stevens Limited ABN 91 141 447 207, AFSL 351578

Mason Stevens Super ABN 34 422 545 198 RSE Registration Number R1004168

Trustee: Diversa Trustees Limited ABN 49 006 421 638 RSE License Number L0000635 AFSL License 235153

The Authorised Persons below with “full transact” access will be able to view and transact on the Distributor’s clients’ accounts in Mason Stevens Products and if applicable, receive statements regarding payments to the Distributor. The Authorised Persons will also have access to create new client accounts, upload supporting documentation, amend certain client contact details, and use SuperMatch to retrieve records of clients’ super funds and consolidate their super accounts. A unique user name will be allocated to each Authorised Person. Please do not share this with others. The Authorised Persons will have access to clients advised by the following Representative/s:

Distributor/AFSL holder

Practice

Representative/s (All or a selection)

Authorised person 1

Mr Ms Mrs Miss Dr Other

First name

Surname

User type Adviser support Dealer group user

Access level read only full transact

Date of birth

Business number

Mobile

Email

Office address

Suburb

State

Postcode

Country

Authorised person 2

Mr Ms Mrs Miss Dr Other

First name

Surname

User type Adviser support Dealer group user

Access level read only full transact

Date of birth

Business number

Mobile

Email

Office address

Suburb

State

Postcode

Country



Authorised person 3

Mr Ms Mrs Miss Dr Other

First name Surname

User type Adviser support Dealer group user

Access level read only full transact Date of birth

Business number Mobile

Email

Office address

Suburb State Postcode

Country

Authorised person 4

Mr Ms Mrs Miss Dr Other

First name Surname

User type Adviser support Dealer group user

Access level read only full transact Date of birth

Business number Mobile

Email

Office address

Suburb State Postcode

Country

Please ensure this form is executed by two directors, a director and secretary or a sole director, or two Authorised Signatories.
If executed by an Authorised Signatory a Board Resolution must be provided together with this form for Mason Stevens to verify the authorisation.

By signing this form you have read and agree to be bound by the representations and warranties made in this form and the terms and conditions of the Mason Stevens Distributor Registration Form or the Distribution Agreement between Mason Stevens and the Distributor.

Signature of Director / Authorised Signatory

Print name

Date

Signature of Director/Company Secretary / Authorised Signatory

Full name

Date

