



## Perpetual Private Wrap

Perpetual Trustee Company Limited ABN 42 000 001 007 AFSL 236643  
Equity Trustees Superannuation Limited ABN 50 055 641 757 AFSL 229757 RSE L0001458  
Perpetual Super Wrap ABN 22 897 174 641 RSE R1074406  
The Perpetual Cash Account is a deposit with Macquarie Bank Limited ABN 46 008 583 542 AFSL 2375021

# PERPETUAL PRIVATE WRAP THIRD PARTY ONLINE ACCESS: AUTHORISATION FORM

Use this form to authorise a registered third party (such as your accountant) to view your Wrap account information online.

Third party online access enables your nominated third party to view your Wrap account information and download account reports through the Perpetual Private Wrap platform. Your nominated third party cannot amend your account information, place transactions or withdraw from your account. Your nominated third party must be a registered third party with Perpetual Private Wrap in order for you to grant them access to view your account. To register the third party needs to complete the *Third Party online: registration form*.

PLEASE USE BLACK INK

### 1. Your account details

Please list the accounts for which you would like to authorise third party access:

	Account number	Account name
1.	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>

### 2. Third party details

Title  
☐ Mr ☐ Mrs ☐ Miss ☐ Ms Other

Name of individual/authorised representative of the company/firm

Name of company/firm

**Address**  
Street number and name or PO Box

Suburb  State  Postcode

Wrap third party code (for the individual or authorised representative of the company/firm), if known

*Note: the party must be a registered third party with Perpetual Private Wrap.*

### 3. Declaration and signature of account holder(s)

By signing this form I/we agree to the Terms and Conditions attached. I/we also acknowledge that by granting access to the third party nominated above, I/we am/are authorising them to view and download details of my/our Wrap account(s) specified above by generating any of the reports available via the Wrap website. I/we also acknowledge that the access is also authorised to the officers, employees and agents of the nominated company. This authority does not allow transactions to be made on my/our account(s) by the third party. Authority may be revoked at any time in writing by us.

**Signature (in black ink)**

Print name

Date  /  /

**Signature (in black ink)**

Print name

Date  /  /

## 4. Terms and Conditions for Third Party Online Access

### BACKGROUND

1. "We", "us" or "our" refers to each of Perpetual Trustee Company Limited (ABN 42 000 001 007) and Equity Trustees Superannuation Limited (ABN 50 055 641 757) and their employees and agents.
2. We offer a facility by which users are able to access our software containing client data, by way of internet. This facility which includes associated data, information and software owned by or licensed to us, is referred to throughout these conditions of use as the Platform. We agree to allow a third party access to and use of the Platform, on the conditions of use below.
3. "Third Party" refers to any other party that you give access to view your account online, including companies, firms or sole traders. If applicable "Third Party" may also refer to administrative staff of the company or firm.
4. Platform means the Perpetual Private Wrap online facility by which the Dealer and its Representatives are able to access some or all of the services online and any product specific software containing Client data, permitting or facilitating reporting, monitoring and Client transactions from remote locations including systems to report, monitor and transact in relation to the Perpetual Private Wrap Products.

### CONDITIONS OF USE

1. You authorise a "Third Party" to view the information of your account on the Platform.
2. You authorise the "Third Party" to use the Platform to view your account, if permitted by us:
  - a) for legitimate purposes, and
  - b) in accordance with the terms and conditions of use, and
  - c) not to interfere with or damage (or attempt to interfere or damage) any code, data, or software associated with the Platform.
3. You will notify us immediately if:
  - a) you suspect the third party is using the access without your authorisation, or
  - b) you believe the third party is breaching any of these conditions of use.
4. You:
  - a) accept full responsibility and you indemnify us for any expense, loss or liability (howsoever characterised or caused) incurred as a result of the Third Party using the Platform, and
  - b) release us from claims and liabilities in connection with any act or omission relating to the appointment of a third party to your account.
5. Anything associated with or available through the Platform belongs to us or other third persons and is protected by intellectual property rights.
6. We will use reasonable efforts to provide (but does not warrant that we will provide):
  - a) access to the Platform for the third party at all reasonable times, and
  - b) reliable data and information, to the extent that it is within our control. We take no responsibility for the reliability of data and information outside our control.
7. Where you give authority to a company, firm or sole trader:
  - a) the company, firm, or sole trader will give us details of people who can view your account on their/its behalf
  - b) you acknowledge and agree that the company, firm, or sole trader may do this
  - c) the company or firm must tell us in writing if any nominated person no longer has authority. If we have not been advised in writing that the person no longer has authority, then that person may still view your account and you cannot claim that he or she is not acting for you until we are told by the company or firm in writing.
8. Subject to conditions and warranties implied by legislation, we exclude:
  - a) liability for any delay, interruption, or unavailability of the Platform and for any inaccuracy or incompleteness of data provided to a third party and available online, and
  - b) all terms implied by statute, general law, or custom except ones that may not be excluded. If we breach any condition or warranty implied by legislation into a contract with a consumer, we limit our liability for that breach to a resupply of the goods or services in respect of which the breach occurred.
9. We reserve the right to:
  - a) change any of these conditions of use at any time and you agree to comply with those changes from the time you are notified (which may be by a notice on the Platform or by any other form of notice), and
  - b) suspend or cancel the appointment of a third party as an authority on your account without telling you in writing.
10. This authority takes effect on the date that we amend our records to note the appointment and continues until you cancel it by telling us in writing. Cancellation also takes effect on the date that we amend our records to note the change.

1. Please ensure your client signs the form
2. Retain a copy for your records
3. Send this form to:  
**Perpetual Private Wrap**  
GPO Box 5230  
Sydney NSW 2001

If you have any questions about completing this form – Clients please contact your financial adviser,  
Advisers please contact us on **1800 099 652**.

