

Authority to Release Information to a Third Party

FORESTERS
FINANCIAL



Part 1: Member Details

Member Number

Title Mr Mrs Ms Miss Other

First Name Middle Name

Last Name

Birth Date Male Female

Street Address

Suburb State Postcode

Email

Contact Number

Part 2: Third Party Details

Contact Name

Organisation
(if applicable)

Relationship of
third party to you Financial Advisor Legal Representative Power of Attorney
(please provide evidence)
 Relative Other

If you have named an organisation, Foresters Financial may release information to any person from that organisation who is requesting information about you on behalf of the organisation or on behalf of the person you have named at the organisation.

Part 3: Information that will be released

Once you have given your authorisation, Foresters Financial will release information about you and your investments held at Foresters Financial by you on this form. The third party can request information either verbally or in writing. The types of information that Foresters Financial will release under this authority are:

- Name, date of birth, address and contact details
- Account balance
- Contributions made into your account, including the amount, date/s received and the payer of the contribution
- Details about any withdrawals, including the type of withdrawal and the current status of the withdrawal
- Your member number
- Information about beneficiaries nominated
- Investment choice information
- Details about any correspondence sent or received

Part 4: Member Authorisation

I authorise the third party that I have named in Section 2 to have access to information about my Foresters Financial account. I understand that this authority will apply once verified by Foresters Financial, and will then remain effective indefinitely, unless I choose to revoke it (a revocation must be given in writing).

Signature of Applicant 1

Date

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