

Step 3: Proof of identity of authorised representative

Important note:

In accordance with the AML/CTF Act, we are required to carry out proof of identity procedures for representatives as they act as agents. Please refer to the 'Completing proof of identity' document on cornerstoneportfolioservice.com.au and provide the appropriate identification documents for your representative listed in Step 2.

Where you have a financial adviser listed on your account they may complete the below to verify the identity of the authorised representative.

Proof of Identity table (adviser use only)

Record of proof of identity (ID) ²	ID document 1	ID document 2
Verified from	<input type="checkbox"/> Original <input type="checkbox"/> Certified copy	<input type="checkbox"/> Original <input type="checkbox"/> Certified copy
Document issuer		
Issue date	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Expiry date	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Document number		
Accredited English translation	<input type="checkbox"/> N/A <input type="checkbox"/> Sighted	<input type="checkbox"/> N/A <input type="checkbox"/> Sighted

Declaration by financial adviser

- I have sighted and retained the original certified copies of the nominated representative's identification recorded in the above proof of identity table; and
- I confirm that I have conducted the relevant identification procedure in line with the obligations under the AML/CTF legislation; and
- I consent to provide the Trustee/Service Operator all proof of identification records for the purpose of this form if requested (pursuant to the AML/CTF Rules Part 7.2).

Signature of financial adviser or AFSL holder representative

Date / /

Full name

Licensee

Step 4: Client declaration and signature(s)

Important note: The Trustee/Service Operator collects the information in this form for the purpose of updating the information it holds about you. Any personal information provided in this form will be handled in accordance with the Privacy Policy at cornerstoneportfolioservice.com.au/privacy.

If you do not provide all of the requested information, we may not be able to action your request.

You accept the terms outlined below:

- You hereby **authorise** the person nominated in Step 2 of this form as your agent, to act on your behalf in relation to this account.
- You acknowledge and agree that any action made on the account by the representative has been properly authorised by you.
- You acknowledge and agree that the representative can access all of your account information, including personal information, which is held by the Trustee/Service Operator.
- To the maximum extent permitted by law, you release and indemnify the Trustee/Service Operator and each member of the Insignia Financial Group from and against all demands, actions proceedings, losses, liabilities and costs arising directly or indirectly out of or in connection with authority provided by this form.
- You authorise the Trustee/Service Operator to continue to follow instructions given under this authority until the Trustee/Service Operator receives notice in writing signed to cancel the authority. The authority will become null and void should the person who signed the authority become incapacitated or in the event of their death.

Signature

Signatory 1 Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Additional signatures (if required)

Signatory 2 Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Signatory 3 Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Signatory 4 Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Signatory 5 Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Signatory 6 Date / /

Role (such as Investor/Director/Trustee as applicable)

Full name

Common seal (of company) if required

Please forward all correspondence and enquiries to

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