

Authority to provide information form

To better understand your advice needs and prepare advice for you, we need your authority to contact your current **insurance, superannuation** and **investment** providers. This means you don't have to worry about collecting this information yourself – we'll contact providers you specify on your behalf, collect the information we need, and ensure we move as quickly as possible with your advice.

YOUR DETAILS *Denotes mandatory fields. Please complete in block letters.

First name*	Middle name	
Surname (including any previous)*	Date of birth*	
Email*	Contact number*	
Current street address*		
Suburb*	State*	Postcode*
Previous street address		
Suburb	State	Postcode
Postal address		
Suburb	State	Postcode

YOUR CURRENT PRODUCTS

List your current insurance (life, total permanent disability, trauma, income protection), superannuation, and investment products and providers below so we can request information from them on your behalf.

Product provider's name* <i>E.g. Zurich</i>	Product name <i>E.g. Zurich Wealth Protection</i>	Policy/member number <i>E.g. 1234567</i>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

YOUR DECLARATION AND CONSENT

So we can research the financial products you hold (including those listed above), we need your written authorisation and signed consent to give to your product providers to obtain information from them. Your consent will expire 18 months from the date signed.

- * By ticking this box, I authorise each team member of Zurich Assure's Research Team and my Zurich Assure Financial Adviser to request and receive information about the insurance, superannuation and investment products I hold from any product provider (including the product providers listed in the table above). This includes a request for a copy of my policy or account statement.
- By ticking this box, I authorise my Zurich Assure Financial Adviser to add further details to the table above about my additional insurance, superannuation or investment products as requested by me from time to time, so Zurich Assure can request information about these products on my behalf.
- Where I elect to receive advice as a couple, I authorise Zurich Assure to disclose my personal information to my partner, as part of the process of giving advice to each of us.

We'll send a copy of this form and your ID to your providers as an authority to request and receive the information. We'll also keep the original with Zurich Assure and place it on your file. Some providers may require a certified ID, in these circumstances we will notify you and instructions on how to do this can be found on the back of this document.

I have read the Zurich Privacy Policy and consent to the collection and use of personal information and sensitive personal information about me in the manner described (including disclosing information obtained with my Zurich Assure financial adviser).

Your signature* Date signed*

The Zurich Privacy Policy is available at zurich.com.au/important-information/privacy.html and contains information about how to access and seek correction of personal information and how to raise concerns if you believe Zurich Assure has breached the Privacy Act. For any enquiries please contact us on 13 26 87.

ZURICH ASSURE TO COMPLETE

Financial Adviser's name*

Zurich Assure Adviser's business address

Email Contact number

You can return the completed form and copy of your ID (certified if requested) in one of the following ways:

- Uploading both documents into your Zurich Assure Advice Client Portal.
- Emailing both documents to assure@zurich.com.au
- Mailing copies of both documents or the original documents to:
Zurich Assure Australia Pty Ltd
Reply Paid 91336
North Sydney NSW 2059

How to certify documents

HOW TO HAVE COPIES OF ORIGINAL DOCUMENTS CERTIFIED

Take both the original and a copy of the original to a certifier.

The certifier will:

1. Examine the original to ensure it is not a copy.
2. Examine the copy to ensure it is identical to the original.
A copy can be considered identical even if it is a different size or colour, so long as that does not result in the loss of any material information.

The certifier will then write or stamp the copy with the words:

“Certified to be a true copy of the original seen by me.”

They will sign and date the copy, and write or stamp their:

1. Name
2. Personal or professional address, and
3. Qualification as an authorised certifier

If there are multiple pages to the copy, the certifier will sign or initial and the number all pages.

The copy has now been certified.

WHERE TO HAVE YOUR DOCUMENTS CERTIFIED

The most convenient places to have documents certified are:

- A post office
- A chemist
- An accountant
- A police station

A full list can be found on your local state government website.

Zurich Assure Australia Pty Limited ABN 58 657 804 736, AFSL Number 538863.

Privacy Statement: The collection and management of your information is governed by the Privacy Act 1988 (Cth). Zurich Assure collects, uses, processes and stores your personal information and, in some cases, sensitive information in order for Zurich Assure and other companies in the Zurich Australia Group to provide you with services (including financial advice) and to comply with its legal obligations. By providing your information, you consent to it being used for those purposes. Your personal information (but not sensitive information) may also be used to notify you of other Zurich products and services. If you do not want your personal information to be used in this way, please contact us.

The Zurich Privacy Policy is available at zurich.com.au/important-information/privacy.html and applies to all companies in the Zurich Australia Group, including Zurich Assure. It sets out how your information may be used by the Zurich Australia Group, lists service providers and business partners who may be given your information, countries in which recipients of your information are likely to be located along with details of how you can access or correct your information or make a complaint. For further information, please refer to the Privacy link above, contact the Zurich Privacy Officer by telephone on 132 687 or email us: privacy.officer@zurich.com.au