

# Dealer Group/Adviser authorisation



## About this form

You can use this form to appoint a financial adviser, as representative of a Dealer Group, to perform activities on your behalf.

Once completed and signed, please provide this form to your adviser via email or post.  
Any questions, just call 133 464, 9am–5pm, Monday to Friday (AEST/AEDT).

## Email

[adviser.admin.au@ing.com](mailto:adviser.admin.au@ing.com)

## Post

ING  
Reply Paid 2682  
SYDNEY NSW 2001

## Step 1: Customer details (all fields are mandatory)

Account name(s)

Client Identification number(s)

Existing ING account number(s) to be linked to Adviser

## Step 2: Adviser details

Dealer group name

Adviser name

ING Adviser number

Contact number

## Step 3: Type of authority

Please select the level of authority you are requesting for your adviser:

### For Savings Maximiser, Savings Accelerator, Personal Term Deposit, Business Optimiser, Business Term Deposit only.

- ☐ (a) **View only:** to access and view any information in connection with my/our nominated account(s) with ING (including account balances);
- OR**
- ☐ (b) **Transact:** to make requests and provide instructions to ING on my/our behalf in respect of my/our nominated account(s), in accordance with the terms and conditions of the account(s), relating to (Please choose one or more of the following options as appropriate):
- ☐ Opening new account(s) (including providing all required information to ING)
- ☐ Depositing funds into or withdrawing funds from my/our account(s) (including setting up Automatic Savings Plans and Scheduled Payments)
- ☐ Any activity in relation to the maintenance of my/our account(s) (including providing instructions to ING when any term deposit account matures)
- ☐ Updating my/our details on my/our account(s) – excluding mandatory security, mobile numbers and linked account details (and for business accounts excluding adding, deleting or changing authorised users, or changing your business name, registered business address and/or mailing address). Note: details will be updated on all accounts held with ING under your Client Identification Number.
- ☐ Closing account(s) (any remaining funds will be transferred to my/our linked bank account)
- ☐ **All of the above**

**Note:** By appointing the Adviser to transact on your nominated account(s), the Adviser will automatically be able to access and view any information in connection with your nominated account(s) also.



## Step 4: Terms and Customer Declaration

- This authority does not apply to lending products that may be held with ING.
- I/We acknowledge that the Adviser can authorise another person or persons, such as others in their office (each a 'nominated person') to perform the activities specified in section 2 of these terms on my/our behalf by notifying ING.
- I/We acknowledge that the Dealer Group may appoint a different Adviser to act under this authority and if so I/We will be notified in writing.
- The Adviser remains responsible for ensuring that any ING savings account(s) that they refer to ING on my/ our behalf in the future, are linked to the Adviser.
- This authority takes effect on the date that ING amends its records to note the appointment of the Adviser on the terms of this authority. The authority continues until I/we cancel it by notifying ING in writing or on the phone and ING has amended its records to note the cancellation of the authority. ING may also cancel the appointment of the Adviser under this authority for any reason by notifying me/us in writing.
- I/we acknowledge that ING may vary the terms of this authority by prior written notice to me/us and the appointed Adviser.
- I/we acknowledge that ING has the right to delay, or seek further information, before acting on any instructions purporting to be given by the Adviser or a nominated person under this authority. ING is not obliged to seek further information or make enquiries in connection with any such instruction. ING may take any instruction given under this authority at face value. ING may decide not to act upon any request or instructions provided by the Adviser or a nominated person if ING considers for any reason that the request on instruction has not been made acting on my/our authority.
- I/We agree to:
  - (a) indemnify ING against all loss, liabilities and costs reasonably incurred as a result of the appointment of the Adviser (or a nominated person) or any act or omission of the Adviser (or a nominated person) in connection with my/ our account(s) (including in respect of any withdrawals made from my account(s); and
  - (b) release ING from any claims and liabilities in connection with any act or omission of the Adviser (or a nominated person) in connection with my account(s).
  - (c) provided that any indemnity in (a) or (b) is limited to the extent that ING's negligence, willful misconduct or fraud contributed to the loss, claim or liability.

If there is more than one of us, we acknowledge that our liability is joint and several. ING remains liable for any loss or liability which, by operation of law, cannot be excluded.

☐ I have read, understood and agree to the terms of this Dealer Group/Adviser Authorisation Form

### Signature of account holder 1

Customer name

Customer signature

Date (DD/MM/YY)

### Signature of account holder 3

Customer name

Customer signature

Date (DD/MM/YY)

### Signature of account holder 2

Customer name

Customer signature

Date (DD/MM/YY)

### Signature of account holder 4

Customer name

Customer signature

Date (DD/MM/YY)

## Step 5: Adviser declaration

I understand the terms in Step 4 and have provided an original ink certified identification document.

Adviser signature

Date (DD/MM/YY)

