

## THIRD PARTY AUTHORITY

### Client 1

Name:

Date of Birth:

Address:

Institution:

Policy Number:

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Address:

- We hereby give authority to Beresfords Financial Planning and its staff to access information regarding our account details. A member of Beresford Financial Planning staff will be contacting you shortly and I would appreciate it if you would supply them with any information that they require including copies of member statements.
- This authority is valid until revoked.
- Please note: THIS IS NOT A REQUEST TO CHANGE ADVISERS.

### Contact details are as follows:

Financial Planners: James Beresford  
Harry Bronn  
Trudi Beresford

Staff: Erica Ibaviosa                      Stephen Smallcalder  
Nimfa De Los Santos                      Alex Mercado  
Katrina Reyes

Company: Beresfords Wealth Management  
Licensee: Blicensed Pty Ltd  
ABN: 34 153 990 660  
AFSL: 318 930

Mailing Address: Level 7/75 Pitt Street  
Sydney NSW 2000

Email Address: [paraplanner@beresfords.com.au](mailto:paraplanner@beresfords.com.au)  
Phone: 02 9993 3900

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For any queries regarding this request, please contact Katrina on (02) 9993 3916.