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# Margin lender user access and maintenance form

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This form can be used to set up new user access or update existing user details for an authorised margin lender personnel on the CFS Edge platform.

Prior to submitting this form, please ensure you have filled out all the necessary sections and signed and dated the declaration. All fields marked with an asterisk (\*) are mandatory for the completion of this request.

Please email the completed form to [wrapproductqueries@cfs.com.au](mailto:wrapproductqueries@cfs.com.au)

For assistance please call 1300 769 619.

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## Section 1: Request type

Please indicate below which option you require:

Create access for a new authorised personnel

Modify details for an existing authorised personnel

User name

Please proceed to Section 2. You can complete all fields or just the information which needs to be updated.

Remove access for an existing authorised personnel

User name

Please proceed to Section 3.

## Section 2: Nominated authorised personnel details

\*Margin lender provider name

\*Title                      Mr              Mrs              Miss              Other

\*Given name(s)

\*Surname

\*Date of birth

\*Mobile number

\*Email address

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## Section 3: Authorised signatory(ies)

I/We declare and agree:

- that this is an offer from us to CFSIL to be registered on the CFS Edge platform
- CFSIL can accept or reject this offer at its sole discretion, acting reasonably
- the details provided are true and correct
- as the authorised signatory(ies), I/we have conducted appropriate due diligence checks to confirm the requested person should be provided with this access, and
- I/we have the authority to authorise access changes for existing users or authorise the setup of new users by signing below.

### Signature of the Duly Authorised Officer

Name

Position

Signature

Date

### Signature of the Duly Authorised Officer

Name

Position

Signature

Date

### Signature of the Duly Authorised Officer

Name

Position

Signature

Date