



Westpac Margin Lending Portal Support Staff Access Request

Use this form to add new support staff users on the Westpac Margin Lending Portal. The nominated support staff users will have visibility of all clients/advisers under the Adviser/Dealer Group code listed in section 1.

Note: The users nominated in section 2 will retain access to the Westpac Margin Lending Portal until we are notified in writing to remove their access.

Questions?

If you have any questions regarding completing this form, please call us on 1800 816 222. Phone lines are available Monday – Friday, 8.30am – 5.30pm (Sydney time).

Privacy Notice

All personal information we collect about you is collected, used and disclosed by us in accordance with our Third-Party Privacy Notice which is available at westpac.com.au/privacy/supplementary-notices/third-party-notice/. Our Third-Party Privacy Notice also provides information about how you can access and correct your personal information and make a complaint. You do not have to provide us with any personal information but, if you don't, we may not be able to process your application or request.

1. Adviser/Dealer Group details

Please note: If you don't have an existing Westpac Margin Lending Adviser or Dealer Group code, please call us on 1800 816 222 for details on how to obtain one.

Adviser/Dealer Group code

Adviser name

Dealer Group name

2. Support staff user setup

Please set up the following people to have access to the Westpac Margin Lending Portal. Each person listed below will be allocated their own username for use on the portal.

Please note: A mobile number is required to finalise their Westpac Margin Lending Portal access.

1.

Title: Mr Mrs Ms Miss Other, specify

Given name(s)

Last name



DEC11WBCML100

2. Support staff user setup (continued)

1. (continued)

Mobile number

(this mobile number will also receive one-time passwords)

Email address

Support staff role

Adviser Paraplanner Administration assistant Other, specify

2.

Title: Mr Mrs Ms Miss Other, specify

Given name(s)

Last name

Mobile number

(this mobile number will also receive one-time passwords)

Email address

Support staff role

Adviser Paraplanner Administration assistant Other, specify

3.

Title: Mr Mrs Ms Miss Other, specify

Given name(s)

Last name

Mobile number

(this mobile number will also receive one-time passwords)

Email address

Support staff role

Adviser Paraplanner Administration assistant Other, specify



3. Declaration and acknowledgements

Support staff

By signing this form, I declare I have read this form and the information completed is true and correct.

Signature of **support staff user 1**

Date

X

/ /

Signatory's full name

Signature of **support staff user 2**

Date

X

/ /

Signatory's full name

Signature of **support staff user 3**

Date

X

/ /

Signatory's full name

Adviser/Dealer Group authorised representative

By signing this form, I declare I have read this form and the information completed is true and correct.

Signature

Date

X

/ /

Signatory's full name

Adviser Dealer Group authorised representative

You can submit this form by:

mail: Westpac Margin Lending
GPO Box 3917
Sydney NSW 2001

email: mltransact@westpac.com.au

