

# Suncorp WealthSmart® Employer Online access form



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Suncorp Portfolio Services Limited (Trustee)  
ABN 61 063 427 958 AFSL 237905 RSE L0002059

**Please use this form to set up access to Suncorp WealthSmart® online, amend or cancel existing access.**

Please complete this form in a blue or black pen, using BLOCK letters and cross (X) to mark answer boxes.

**Any questions?** If you have any questions about completing this form, just call us on 13 11 55.

## 1. Employer details

Employer number

If you have more than one employer number to which this access applies, please provide the additional employer account numbers.

Employer name

Address

Suburb  State

Business phone    Mobile

Email address

## 2. Set up new or amend existing Suncorp WealthSmart online access

If you'd like to provide access to more than three people, please copy this section and attach to this form. It's important that you tick the level of access you want employees to have.

Access levels for authorised users:

**A Employer authorised – full access:** These users can create/upload contribution schedules, create/modify/terminate members, submit/authorise contribution schedules and change employer details (ie. all functions currently available).

**B Employer authorised – restricted access:** These users can do everything that a user with full access can do, except submit/authorise contribution schedules.

**C Employer authorised – read only access:** These users view and print information but cannot alter it.

I/We authorise the following employee(s) to have access to Suncorp WealthSmart online.

Title  Last name

Given name(s)

Position  Business phone

Email

Access level

Title  Last name

Given name(s)

Position  Business phone

Email

Access level

Title  Last name

Given name(s)

Position  Business phone

Email

Access level  A  B  C

### 3. Cancel existing Suncorp WealthSmart online access

I/We authorise the following employee(s) to have their access removed from Suncorp WealthSmart online.

Last name

Given name(s)

Last name

Given name(s)

### 4. Declaration

- I agree the information I've provided on this form is true and correct.
- I've read and agree to be bound by Suncorp WealthSmart's terms of use and privacy policy which are available from your website at [www.suncorp.com.au/privacy](http://www.suncorp.com.au/privacy)
- I authorise my employees listed in section 2 to access my Suncorp WealthSmart online account.
- I accept I'm responsible for the conduct of my employees when they access my Suncorp WealthSmart online account.
- I'll promptly advise you if any of these details change or of any circumstances where employees have or should have (eg where they cease to be my employee) their access removed to my Suncorp WealthSmart online account.
- I accept that if I've got an Asteron WealthSolutions online account, any changes requested on this form will also be made to my WealthSolutions online account and the declarations I've made should be read accordingly.

Print full name

Position

Date

### 5. Need more information?

If you need more information, please contact our Customer service team:  
Phone '13 11 55' Monday to Friday, 8am to 6pm (AEST)

Please send the completed form to: **Suncorp WealthSmart**  
**GPO Box 2585**  
**Brisbane QLD 4001**

**Or fax to: 07 3002 3259**