

Date: _____

doco 201192

Client Name: _____ DOB: _____

Client Address: _____

Attention: (Name of Fund Manager) _____

Fax Number: _____

39 North Parade,
Campsie, N.S.W 2194
Australia
Phone: (02) 9784 2000
Fax: 1300 307 699
International Phone: +61 9784 2000
International Fax: +61 9784 2099
Email: cbc@cbc.com.au
Website: www.cbc.com.au
Within Australia
Freecall: 1800 622 892
Freefax: 1800 622 540
Freepost: Reply Paid 135
P.O Box 135
Campsie,
N.S.W. 2194

Authority to Access Client Information

I, _____ hereby give Gavin Latz, Anthony Mihaljek, Dimos Fessopoulos, Maciek Slusarczyk and Winnie Tam of **Investors Save Dollars** from **Count Wealth Accountants** authority to access all the information on my Fund as shown below including all fees and charges:

Account Number: _____

Account Name: _____

Signed _____

Signed _____

Privacy Statement

The information we collect from you may be used to prepare a **Statement of Advice** or to provide you with specific services and information requested by you. Failure to complete, or a partial or inaccurate completion of your **Financial Needs Analyser** questionnaire may result in a **Statement of Advice** that is inappropriate to your needs.

In addition to this, we may also use your details to inform you of the other services we can provide.

Count Financial Limited will, on request, provide you with access to personal information we hold about you. If your details are inaccurate, please let us know and we will take reasonable steps to correct them. To gain access to this information or to notify us of any changes to your details, please email us at privacy@count.com.au or write to us at Reply Paid 644 GPO Box 3323 SYDNEY NSW 2001. Alternatively you can contact us on (02) 8272 0292. Please note we will only disclose your personal information when:

- * It is required or allowed under law, or in connection with legal proceedings;
- * You have consented (expressly or implied); or
- * A person or organisation is authorised by us to provide limited financial, administrative or other services on our behalf. We will provide these organisations only with the information they need to deliver the service.

Your personal information may also be used for marketing purposes (but we will not disclose your personal information to a third party) but on request, your details can be removed from our marketing mailing list.

For more information on our privacy policy, please refer to our Privacy Statement on www.count.com.au



FPA
FINANCIAL PLANNING
ASSOCIATION
of Australia Limited

Looking after your financial life