



**Only authorise
somebody you trust**

Authorising a third party

Everything you need to know about authorising someone to access your account.

Who you can authorise

You can give permission for certain people to ask questions about your account and, in some cases, make transactions on your behalf. The table below outlines who can do what.

Who	Can they ask about your account?	Can they make transactions for you?	How long does it last?
Your spouse	✓ Yes	✗ No ¹	Until you cancel it
Your parent (if you're under 18)	✓ Yes	✓ Yes	Until you turn 18
Your parent (if you're 18 or over)	✓ Yes	✗ No ¹	Up to two years unless you cancel it
Other family or friend	✓ Yes	✗ No ¹	Up to two years unless you cancel it
Your adviser e.g. a financial planner, lawyer, accountant, or adviser for Departing Australia superannuation payment (DASP) ²	✓ Yes	✗ No ¹	Up to two years unless you cancel it
Your power of attorney	✓ Yes	✓ Generally yes ³	This will depend on the legal documents.
Your legally appointed administrator or guardian	✓ Yes	✓ Generally yes ³	This will depend on the legal documents.

¹Unless they have a valid power of attorney or are your administrator or legally appointed guardian. | ²Includes staff working at the organisation, unless you tell us otherwise. | ³Only if the legal documents allow them to manage your financial affairs.

Your power of attorney

When a person or organisation has a power of attorney, you can give them the legal authority to make financial decisions for you.

What they can do and how long the authority lasts will depend on what's written in your power of attorney.



The rules are different in each state and territory, so you should seek legal advice in your area to work out if this is right for you. Fees may apply.

If you'd like to remove a power of attorney from your account, you'll need to send us a certified copy of the revocation notice. You can contact the relevant government department in your state or territory for more information.

Your legally appointed administrator or guardian

A court or tribunal may appoint an administrator or guardian to make legal and financial decisions for you.

What they can do and how long the authority lasts will depend on what's written in the legal documents.

The rules are different in each state and territory.

If an administrator or guardian is added to your account, they will be responsible for all transactions on your account. You personally won't be able to:

- cancel the authorisation
- make transactions on your account, such as making withdrawals or changing your investments
- update your account details, including contact details or beneficiary nominations
- apply for new products

If you'd like to change or make a transaction on your account, your authorised administrator will need to complete the transaction for you.

We can't remove an administrator or guardian authorisation from your account until the document expires or we receive confirmation from the relevant authority that the order no longer applies.

How to authorise a third party

You can authorise a third party to enquire about your account by:

- calling us on **1800 005 166**
- returning a completed *Third party authorisation form*

Please note that we can't authorise parents, powers of attorney or legally appointed administrators or guardians over the phone, as extra evidence is required as outlined below:

Third party	What you'll need
Your parents (if you're under 18)	• a certified copy of your birth certificate showing your parent's name(s) • certified proof of your parent's identification
Power of attorney	• a certified copy of the power of attorney document⁴ • certified proof of your attorney's identification, if your power of attorney is an individual (not an organisation)
Legally appointed administrator or guardian	• a certified copy of the legal or administration order document, or an electronic (non-certified) administration order document • certified proof of your attorney's identification, if your power of attorney is an individual (not an organisation)

⁴The rules for powers of attorneys are different in each state and territory, so you should seek legal advice in your area to work out if your power of attorney needs to be registered.

Providing proof of identification

To authorise someone to make transactions for you, you'll usually need to provide proof of their identification so we can verify it's the right person.

A current driver licence or passport will generally do the trick. If they don't have one or have changed their name, see our *Guide to providing proof of ID* fact sheet available at caresuper.com.au/proof-id-guide for more options.

How to provide certified documents

1.

Make copies of your documents.

Photocopy all pages, including both sides if the document is double-sided.

3.

Send us the certified copies (not the originals).

Email info@caresuper.com.au

Post GPO Box 1547, Hobart TAS 7001

2.

Have them certified.

Take the original and photocopies to an authorised person and ask them to certify them.

See *Who's an authorised person?* on page 4 for a list of people who can certify documents.

To certify your documents, the authorised person must:

Compare the photocopy to the original then stamp or write either **'This is a true and correct copy of the original'** or **'Certified true copy'** followed by their:

- ☒ signature
- ☒ full name
- ☒ qualification or position (such as police officer)
- ☒ date of signing



If you provide a certified copy of your driver licence, make sure the card number is visible. The card number may be on the back of your licence.



For legal documents such as powers of attorney:

- the first and last page need to be certified
- all other pages in the document must be initialled by the person completing the certification

Who's an authorised person?

The following people can certify documents:

- a police officer
- a permanent employee of Australia Post with five or more years of continuous service
- a financial adviser or financial planner
- a finance company officer with five or more years of continuous service
- a legal practitioner
- a medical practitioner, nurse, or midwife
- a pharmacist
- an architect
- a dentist
- an optometrist
- a chiropractor, physiotherapist, or occupational therapist
- a teacher employed at a school or tertiary education institution
- a judge, registrar, or deputy registrar of a court
- a magistrate
- a Chief Executive Officer of a Commonwealth court
- a Justice of the Peace
- a notary public officer
- an Australian consular officer or an Australian diplomatic officer
- an officer with, or an authorised representative of, a holder of an Australian Financial Services Licence, with two or more years of continuous service with one or more licensees
- any person listed in Schedule 2 of the Statutory Declarations Regulations 2018.



Some authorised people may charge a fee for certifying your documents. Not all authorised people can certify your documents:

- ✗ You can't certify your own documents
- ✗ Family members can't certify your documents.

If you live overseas, these people can certify your documents:

- a police officer
- a judge, registrar, or deputy registrar of a court
- a magistrate
- a Justice of the Peace
- a notary public officer
- an Australian consular officer or an Australian diplomatic officer.



What happens when your authorised person contacts us?

Each time your authorised person contacts us, we'll ask them a series of questions to confirm their identity and connection to you. These checks help protect your account and personal information.

How to cancel an authorisation

You can usually cancel a third-party authorisation by:

- calling us on **1800 005 166**
- emailing us at info@caresuper.com.au

To remove a power of attorney, administration order or legally appointed guardian from your account, we'll need evidence of the revocation orders.

When you don't need to give authorisation

Some people can update your details or make transactions on your behalf without completing any forms, such as:

- your parents (if you're under 18)
- someone with a valid power of attorney⁵
- a legally appointed administrator or guardian⁵

However, they may need to show evidence of your relationship or their legal authority (see page 2 for details). If you'd like someone to make transactions on your account for you, you may need to give them a formal power of attorney. See page 2 for more details about powers of attorney.

⁵Only if the legal documents allow them to manage financial affairs.



We'll only pay withdrawals to you, **not** your authorised third party.



All our forms and publications are available at caresuper.com.au/forms or call us, and we'll send you a copy.

Here to help

1800 005 166 (+61 3 7042 2723 if overseas)
caresuper.com.au

 info@caresuper.com.au  GPO Box 1547 Hobart TAS 7001



This document contains general information only and doesn't take into account your objectives, financial situation or needs. Before making a decision about CareSuper, you should consider if this information is right for you. You may also wish to consult a licensed financial adviser. Consider the PDS and TMD at caresuper.com.au/pds. Any advice provided in this document is provided by CareSuper Advice Pty Ltd ABN 78 102 167 877, AFSL 284443. A copy of the *Financial services guide* for CareSuper is available at caresuper.com.au/fsg.

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Third party authorisation

1800 005 166
info@caresuper.com.au
GPO Box 1547, Hobart TAS 7001

Important information

This authorises the nominated person or organisation to access information on all CareSuper accounts held by you while the authority remains valid.

Authority to act on a member's accounts

A third party can only act on your behalf in the following circumstances. If a third party falls into one of these categories and is able to provide the required documents, they can sign this form and will be able to act on your behalf:

	The following must be provided:
Parents of minor children	A certified copy of the minor's birth certificate.
Power of attorney	A certified copy of the power of attorney document which has been registered in Australia.
Legally appointed guardian or administrator	A certified copy of the legal orders.

Section 1

Your details

Member number

Date of birth (DD MM YYYY)

Last name

Given name(s)

Residential address

Suburb/Town/City

State

Postcode

Preferred phone

Email



Authorise your family or friends

[illegible]

Authorise your professional adviser

Email

Section 4

Authorise your power of attorney or legally appointed guardian or administrator

The person I'm authorising is my:

☐ Power of attorney ☐ Guardian or administrator as appointed by an Australian court or tribunal

You'll need to provide certified copies of the legal documents. See the important information section on page 1. Please note, we may require evidence if you want to remove this authorisation from your account in the future.

Their details are:

Mr Mrs Ms Miss Dr

Date of birth (DD MM YYYY)

Given name(s)

Last name

Residential address

Suburb/Town/City

State

Postcode

Phone

Email

Section 5

Authority duration

How long your authority lasts depends on the type of nomination you're making:

- **spouse** – this won't expire unless you ask us to cancel the authority
- **parent** – this expires when you turn 18 years of age
- **power of attorney and legally appointed guardians and administrators** – this depends on the nature of the arrangement and what's written in the legal documents
- **all other authorisations** – these expire two years from the date you sign this form

If you want your authority to be for a shorter period, tell us when it should expire:

Expiry date (DD MM 20YY)

Section 6

Member declaration

By signing this form I'm making the following statements:

- I understand that I'm authorising a third party to have access to my account information.
- I understand that certain third parties may update and transact on my account on provision of certified copies of legal documentation as evidence of their authorisation.
- I consent to the use of my personal information as outlined in CareSuper's *Privacy policy* available at caresuper.com.au/privacy-policy or by calling us on **1800 005 166**.

Your signature

Date (DD MM YYYY)



Return the completed, signed and dated form via:

- upload using the Contact Us portal in **Member Online**
- email to info@caresuper.com.au
- mail to CareSuper, GPO Box 1547, Hobart TAS 7001