



# Authority to release information form

Complete this form to provide a third party with access to all relevant information or documentation on your investments, insurances and superannuation or other financial information.

Follow the steps below to provide authority to a third party.

## STEP 1 Member details (please use BLOCK letters)

Member number (if known)

Date of birth (DD/MM/YYYY)

Surname (family name)

Given names

Current address (as listed on file)

Postcode

State




Previous address

Postcode

State




Contact number

Email



Please note, any amendments to this form need to be initialed and dated by the member.

## STEP 2 Third party details

Please release all relevant information or documentation on my investments, insurances and superannuation or other financial information to the third party listed below.

Full name

Address

Postcode

State




Company name (if applicable)

ABN

AFSL

Contact number

Fax

Email



Please keep this authority in force until advised otherwise in writing by the member.

### STEP 3 Member signature

X	Date (DD/MM/YYYY)									
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Plum can only accept this form if it has been signed and dated within the last 6 months.

### STEP 4 Privacy Statement

We collect your personal information from you directly wherever we can, but in some cases we may collect it from third parties such as your adviser, employer, or doctors in the case of a claim. We do this to determine your eligibility and to administer the product. If personal information is not provided, we may not be able to provide you the product or a service, or administer it appropriately. Company, anti-money laundering, superannuation and tax laws require some of the information to be collected.

We may disclose your personal information with other NAB Group companies, and to external parties for purposes including: training staff; development and testing of products, services and systems; and risk management, planning, research and analysis. If we need to share your information with organisations outside Australia – a list of those countries is at [nab.com.au/privacy/overseas-countries-list](http://nab.com.au/privacy/overseas-countries-list).

To let you know about the products the NAB Group has on offer we and other NAB Group companies may use your personal information for marketing activities. You can let us know at any time if you no longer wish to receive these direct marketing offers by contacting us.

More information about how we collect, use, share and handle your personal information is in our Privacy Policy, including how you may access or correct information we collect about you and how you may make a complaint about a privacy issue, available on [plum.com.au](http://plum.com.au). Contact us for a paper copy or if you have any questions or comments.

#### The completed form can be returned via:

**Mail** – Plum Super  
Reply Paid 63,  
Melbourne VIC 8060

**Email** – [service@plum.com.au](mailto:service@plum.com.au)

**Fax** – 1300 99 7586