

## Client Agreement

TTDS Holdings Pty Ltd ACN 140 742 383 (AFSL 344 582) and its authorised representative The Term Deposit Shop Pty Ltd ABN 97 159 123 001 (Authorised Representative Number 438880) ('TTDS')

### Client Name

### Entity Type

- ☐ Individual and Joint Accounts      ☐ Sole Trader      ☐ Company
- ☐ SMSF or Trust – Individual as Trustee      ☐ SMSF or Trust – Company as Trustee
- ☐ Association      ☐ Partnership      ☐ Government Body

1. The Client agrees to be bound by the TTDS [Terms and Conditions](#) available on the TTDS website ("Terms and Conditions").
2. CLIENT AUTHORITY
  - 2.1. I/We, the undersigned, do hereby grant a limited power of attorney to TTDS to have full power and authority to undertake and perform all things, on behalf of the Client, which are reasonably necessary to facilitate the provision of the Services, as set out in the Terms and Conditions including, but not limited to, signing documents on behalf of the Client and on the terms set out in this clause.
  - 2.2. TTDS may only exercise this power of attorney following the Client's verbal and, or, written instructions to perform any, or all, of the Services.
  - 2.3. This power of attorney is to become effective immediately upon the execution of this Agreement.
  - 2.4. In the event that the Client suffers any subsequent legal incapacity, the Client authorises the Client's legal representative to provide the necessary instructions to TTDS pursuant to clause 2.2.
  - 2.5. This authority is given only to act as per instructions given by me/us via the TTDS website or by any other means of documented instruction, or received by my/our adviser listed below (if applicable).
  - 2.6. TTDS agrees to accept this appointment subject to its Terms and Conditions, and agrees to act and perform in said fiduciary capacity consistent with my best interests as he in his discretion deems advisable.
  - 2.7. This power of attorney may be revoked by me/us in writing at any time as per the Terms and Conditions, provided any person relying on this power of attorney shall have full rights to regard it as current and in force.

### 3. APPOINTMENT OF YOUR FINANCIAL ADVISER

- 3.1. If you would like to appoint your financial adviser, stockbroker or accountant ("your adviser") to give instructions to TTDS on your behalf, please arrange for them to sign below. This authority allows your adviser to initiate or review your term deposit or arrange for the principal to be paid back to your nominated account.
- 3.2. When you give access to your adviser and that adviser is a company or firm, you agree that TTDS may accept instructions from any relevant authorised officer of the adviser noted with TTDS.

Adviser name:

Firm Name:

Dealer Group:

I declare that I have obtained the identification records of the above Client(s) and carried out the appropriate verification procedures in accordance with the FSC/FPA Industry Guidance Note and am reasonably satisfied as to the identity of the Client(s). Copies of the identification will be provided as part of this application. I agree to the TTDS Terms and Conditions available at [insert URL].

SIGNATURE OF ADVISER

### 4. SPECIAL CONDITIONS

## Signing Schedule

Signatory 1

Name

Date

Signature

Signing Capacity

☐ Individual ☐ Director ☐ Secretary ☐ Trustee ☐ Authorised Signatory ☐ Other

If signing as a sole director and secretary, please check this box ☐

Signatory 2

Name

Date

Signature

Signing Capacity

☐ Individual ☐ Director ☐ Secretary ☐ Trustee ☐ Authorised Signatory ☐ Other

Signatory 3

Name

Date

Signature

Signing Capacity

☐ Individual ☐ Director ☐ Secretary ☐ Trustee ☐ Authorised Signatory ☐ Other