

BGL Data feed authority

Please complete this authority to provide LGT Crestone Wealth Management Limited (LGT Crestone) with authorisation to disclose current and historical transactions and holdings from your nominated account via a regular data feed to the External Party nominated in this form.

Fields marked with an * are mandatory.

1 LGT Crestone account details

Account name*

Account number* (9 digits starting with 00)¹

Portfolio number* (9 digits starting with 3)²

¹ Please note that the LGT Crestone portfolio(s) linked to the above LGT Crestone account(s) are captured via this Data Feed Authority.

² Note to accountants: Please use the portfolio number when requesting the data feed activation within BGL.

2 External Party details

Please nominate all external parties you authorise to receive the account information related to your above nominated account (e.g. the accounting practice and other nominated individuals):

External Party (accounting practice) name*

Business address*

(PO box not permitted)

City/suburb*

State*

Postcode*

Country*

2.1 Financial platform used by External Party

BGL Simple Fund 360 (offered by BGL Data Services Pty Ltd)

2.2 External Party – Primary accountant name

_____	_____
First name*	Middle name

Last name*	

_____	_____
Phone*	Email*

2.3 External Party – Additional accountant name

_____	_____
First name	Middle name

Last name	

_____	_____
Phone	Email

3 Authorisations*

By signing this Data Feed Authority and providing it to LGT Crestone Wealth Management Limited (LGT Crestone) you:

1. Authorise LGT Crestone to provide the External Party nominated in this authority with transactional information from your account(s) (your Data) by way of an electronic file data feed.
2. Acknowledge that by signing and delivering this authority to LGT Crestone, the External Party will be provided with regular access to collect and use your Data. To that extent, LGT Crestone will not be liable for any incomplete or inaccurate information resulting from the collection, transmission and subsequent use of your Data by the External Party, including with respect to any actions, omissions, fraud or negligence of the External Party.
3. Acknowledge that once your Data is provided to the External Party pursuant to this authority, the External Party is responsible for the security, handling and protection of your Data, and to that extent, any loss or damage arising on you as a result of the conduct of the External Party is solely the responsibility of the External Party.
4. Indemnify LGT Crestone against all losses and costs incurred directly or indirectly by you as a result of this authority, and to that extent, you also agree to release LGT Crestone from any claims and liabilities arising under or in connection with this authority.
5. Acknowledge that this authority takes effect on the date that LGT Crestone receives a validly executed authority from you. You may terminate this authority by providing a written termination notice to your adviser.
6. Understand that where there is any inconsistency between the terms of this authority and any other LGT Crestone terms and conditions, the terms and conditions of this authority will prevail to the extent of any such inconsistency.
7. Acknowledge that LGT Crestone may, at its sole discretion, discontinue the supply of Data to the External Party without any notice or advice to you. Where this occurs, you acknowledge that LGT Crestone has no liability to you, and no further obligation to provide your Data to any other third party.

NOTE: By signing this Authority as an attorney for the account holder, you hereby confirm to LGT Crestone that you have the power to sign this Authority under the power of attorney instrument under which you have been appointed by the account holder and that, at the time of you executing this Authority, you have no notice of the revocation of that power of attorney.

Account signatory 1 / Attorney	Date

Name

Account signatory 2 / Attorney	Date

Name

Additional signatory 3 / Attorney	Date

Name