

## THIRD PARTY AUTHORISATION ACCESS ONLY

By completing and signing this form, you can authorise a named person only to receive and access information on your account. The Authorised Person will **not** be able to give instructions, buy or sell investments, or change any details on your account.

**Please complete this section in full**

**CLIENT**

Client Name

Account reference(s)

Client Address

**AUTHORISED PERSON / ATTORNEY**

Name

Address

**Online Services**

To provide online access to your account please tick here

*if you choose this option a Username & Password will be sent by post to the authorised person/attorney*

\* Mobile Number

\* Email

*\* An email address and mobile number are required to use online service*

### THIRD PARTY – ACCESS ONLY

I \_\_\_\_\_ appoint the above-named \_\_\_\_\_ as my Authorised Person to receive information including portfolio valuations and statements relating to my account(s) with Davy, reference set out above. I authorise Davy to discuss my account(s) with the Authorised Person. I understand that the Authorised Person will not be able to give instructions on the account, enter into investments on my behalf, or change details on my account.

I intend this authorisation to last:

- for \_\_\_\_\_ days / weeks / months / years from the date on this form *(delete as appropriate)*
- until \_\_\_\_\_ dd/mm/yyyy
- until Davy receives notice in writing from me stating that I want to end the authorisation

Please select one only

I understand that this authorisation will no longer be effective in the event of my death.

Signed \_\_\_\_\_ Date \_\_\_\_\_

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