

## AUTHORITY TO ACCESS INFORMATION

### TO WHOM IT MAY CONCERN

I/We \_\_\_\_\_

born \_\_\_\_\_

of \_\_\_\_\_

herby grant \_\_\_\_\_ or any other representative  
of Bridgewood Private Wealth Pty Ltd, Australian Financial Services Licence No.  
389100 authority to access information regarding my/our:

- Investments including direct shares and managed funds
- Superannuation arrangements and policies
- Life and general insurance policies
- Other assets
- Taxation circumstances including information from the Australian Taxation Office and my/our accountant

as required to fully understand my/our financial position in relation to the preparation of my/our Statement of Advice (Financial Plan).

***This authority extends to the collection of information only.***

Signed: \_\_\_\_\_  
(Client)

Date: \_\_\_ / \_\_\_ / \_\_\_

Signed: \_\_\_\_\_  
(Client)

Date: \_\_\_ / \_\_\_ / \_\_\_

Signed: \_\_\_\_\_  
(Authorised Representative)

Date: \_\_\_ / \_\_\_ / \_\_\_