

# Queensland Government Request Form - Financial Advisor Authorisation



The Queensland Government strongly recommends that Financial Advice is obtained prior to entering into a Salary Packaging Agreement.

## > Who can apply?

- Queensland Government employees who wish to authorise a financial advisor/planner to have third party access to your salary packaging account.
- To terminate this authorisation please contact Smartsalary on 1300 218 598.

Applications and requests could take 1-2 pay cycles to take effect.

For more information, read the appropriate booklets and factsheets at [qld.smartsalary.com.au/fact-sheet-library](http://qld.smartsalary.com.au/fact-sheet-library).

## > How does it work?



### Step 1.

Complete the request form



### Step 2.

Email all documents to [customersupport@smartsalary.com.au](mailto:customersupport@smartsalary.com.au)



### Step 3.

We'll add your financial advisor to your salary packaging account



### Step 4.

You will receive confirmation that your request has been processed

## > Checklist

Follow this simple checklist to make sure your request is correct and can be processed quickly.

- ✓ **Have an active Smartsalary salary packaging account.**
  - > If you do not have an active Smartsalary salary packaging account you will need to complete the Salary Packaging Application & Agreement Form.
- ✓ Read the appropriate **Booklets and Fact Sheets** on the website [qld.smartsalary.com.au/fact-sheet-library](http://qld.smartsalary.com.au/fact-sheet-library).
- ✓ **Signed page 4** and returned all pages of the **Financial Advisor Authorisation Request Form**.
- ✓ Read the **terms and conditions**, visit [qld.smartsalary.com.au](http://qld.smartsalary.com.au).

## > How to fill and sign this form

### **With a digital signature**

1. Check that you have Adobe Acrobat PDF Reader to complete this form or download Adobe Acrobat PDF Reader.

> Click here to install: <https://get.adobe.com/reader/>

2. Download the Smartsalary form onto your desktop computer.
3. Fill in the details by typing into the field boxes and save the completed form.
4. Click the signature field to create and add your digital signature to the form.
5. Save and attach all pages.
6. Add any supporting documents.
7. Email the form to Smartsalary for processing.

### **Without a digital signature**

1. Download the Smartsalary form onto your desktop computer.
2. Fill in the details by typing into the field boxes and save the completed form.
3. Print your form and sign the relevant pages.
4. Scan and attach all pages.
5. Add any supporting documents.
6. Email the form to Smartsalary for processing.

### **Important**

- > Submit [all pages and supporting documents](mailto:customersupport@smartsalary.com.au) to [customersupport@smartsalary.com.au](mailto:customersupport@smartsalary.com.au).
- > Forms cannot be processed without a signed declaration.

*Continue to next page >*

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Alternatively, mail to:

Smartsalary Pty Ltd  
QLD-GOV Applications  
GPO Box 4244  
Sydney NSW 2001



Email completed forms to:  
[customersupport@smartsalary.com.au](mailto:customersupport@smartsalary.com.au)

## Section A - Your details

Smartsalary account number

Employer

Given name(s)

Surname

Contact number

Payroll number

**Note:** Log in to your online Smartsalary account at [qld.smartsalary.com.au](http://qld.smartsalary.com.au) to find your Smartsalary account number.

## Section B - Financial advisor(s)/planner authority

Company name

Company ABN

Smartsalary account number  
(of financial advisor/planner,  
if known)

### Financial advisor 1

First name

Contact number

Surname

Start date of authorisation (dd/mm/yyyy)

Address

Email

### Financial advisor 2

First name

Contact number

Surname

Start date of authorisation (dd/mm/yyyy)

Address

Email

#### Privacy notice

The salary packaging administrator is collecting your personal information on this form for the purpose of processing your salary packaging agreements. The salary packaging administrator will pass your personal information on to your agency's payroll section as part of the administration of your salary packaging agreements, Queensland Government Procurement in relation to the management of the salary packaging arrangement, and Queensland Treasury for auditing purposes. Your personal information will not be used for any other purpose or disclosed to any other third party, without your consent, unless authorised or required by law.

[qld.smartsalary.com.au](http://qld.smartsalary.com.au)

Smartsalary Pty Ltd ACN 096 796 100 | GPO Box 4244, Sydney NSW 2001  
Tel: 1300 218 598 | Email: [customersupport@smartsalary.com.au](mailto:customersupport@smartsalary.com.au)

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## Section B - Financial advisor(s)/planner authority

### Financial advisor 3

First name

Contact number

Surname

Start date of authorisation (dd/mm/yyyy)

Address

Email

Please send all claim notifications to my advisor/s.

## Section C - Employee declaration

### I hereby declare that:

- Any information I have provided in relation to this form, including information provided in supporting documents and communications to Smartsalary Staff (both written and verbal) is true, correct and complete to the best of my knowledge;
- I hereby authorise the above mentioned Third Party to access all information and request changes at any time in regards to my salary package arrangement(s);
- I hereby authorise the above mentioned Third Party to sign salary packaging claims on my behalf;
- I understand that the Salary Packaging Application Form must be signed by me and not the above mentioned Third Party;
- I understand that Smartsalary is only able to make changes according to the employer's salary packaging policy;
- I understand that it is my responsibility to contact Smartsalary to end this Third Party Authority if and when I choose to do so;
- I understand that while the authorisation is active, Smartsalary shall make no distinction between the level of access offered to the employee and the authorised third party;
- I acknowledge that this request shall take effect only upon electronic confirmation from Smartsalary; and
- I have read, understand and accept the Smartgroup Privacy Policy (available at [qld.smartsalary.com.au/privacy-policy](http://qld.smartsalary.com.au/privacy-policy)) and I acknowledge that:
  - > all personal information I provided in this form will be will be collected, used, disclosed and held in accordance with that policy;
  - > the above mentioned third party has consented to me providing their personal information to Smartsalary.

Signature \_\_\_\_\_  
(Click to insert digital signature)

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



**Important:** This section must be signed otherwise your request will not be processed.

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[qld.smartsalary.com.au](http://qld.smartsalary.com.au)

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