

STEP 4 UNITING BY PHONE ONLY – TRANSFERRING FUNDS TO ANOTHER FINANCIAL INSTITUTION ACCOUNT

You can use the telephone to transfer funds from some Uniting Financial Services investment products to another nominated financial institution account. If you want to use this service, please complete details below.

Account name

Financial institution

Branch

BSB number - Account number

STEP 5 ACKNOWLEDGMENT BY APPLICANT

PRIVACY

I/We consent to the collection, use and disclosure of our personal information as detailed in the Product Disclosure Statement, Product Information Brochure and the Financial Services Guide.

UFS'S COLLECTION, USE AND DISCLOSURE OF PERSONAL INFORMATION

Information is collected from you to administer and manage your investments and if some or all the information is not collected then it may not be possible to administer your investment. We may use your personal information to provide you with information and marketing material about other products and services provided by Uniting Financial Services. We do not provide your information to any other organisation without your consent, other than those organisations that provide administrative or other services as part of the operation of our business. You can view and obtain our Privacy Policy from our website unitingfinancial.com.au.

MARKETING OPTIONS

From time to time, we may contact you to let you know about (or ask for your feedback as we develop and improve) products and services. If you don't want us to contact you about this sort of thing, or to receive our communication items such as *Mustard Seed* newsletter, *UFS Enews*, investment market updates or to receive promotional items, simply tick here: No thanks

I acknowledge having received, read and understood the Product Disclosure Statement and Product Information Brochure.

Applicant signature - **SIGN BELOW**

Date / /

STEP 6 AUTHORISATION WHERE APPLICANT DOES NOT HAVE AUTHORITY TO OPERATE ON INVESTMENT(S)/LOAN(S) SELECTED

I/we acknowledge having received, read and understood the Product Disclosure Statement and Product Information Brochure. As authorised signatories of the investments/loans we authorise the applicant to have 'enquiry only' access to the investments/loans listed in step 3 overleaf.

Authorised signatory - **SIGN BELOW**

Full name

Date / /

Authorised signatory - **SIGN BELOW**

Full name

Date / /

OFFICE USE ONLY

Limits applied for, that are greater than the \$5,000 daily limit, are approved/declined under the delegated lending authority of UFS management.

Signature

Full name

Date / /

Position



Financial services are provided by The Uniting Church (NSW) Trust Association Limited ACN 000 022 480, ABN 89 725 654 978, AFSL 292186 and by The Uniting Church in Australia Property Trust (NSW) ABN 77 005 284 605 pursuant to a s.911A Corporations Act 2001 (Cth.) authorisation and APRA Banking Exemption No. 1 of 2006 ("Uniting Financial Services"), for The Uniting Church in Australia, Synod of NSW and the ACT pursuant to ASIC Regulatory Guide 87 exemptions. Uniting Financial Services® is a registered trademark of The Uniting Church (NSW) Trust Association Limited and is used with permission by The Uniting Church in Australia Property Trust (NSW). Neither The Uniting Church in Australia, Synod of NSW and the ACT nor Uniting Financial Services is prudentially supervised by APRA. An investment with or contributions will not benefit from the depositor protection provisions of the Banking Act 1959. All financial services and products are designed for investors who wish to promote religious and charitable purposes and for whom profit considerations are not of primary importance in their decision to invest.