

# Authority to Operate: Third Parties



This form may be lodged with Uniting Financial Services or posted to:

**Uniting Financial Services**  
PO Box A2178  
Sydney South NSW 1235

Facsimile or emailed copies of this document are not acceptable.



## Helpful hints for completing this application

- If a signatory is new to Uniting Financial Services, please complete an *Identification and Verification Reference* form.
- For investments in joint names all investors must sign for the authority to be valid.



## Need help or have a question?

Call us on **1300 133 673**

Visit us at [unitingfinancial.com.au](http://unitingfinancial.com.au)

Email us at [contactus@unitingfinancial.com.au](mailto:contactus@unitingfinancial.com.au)

Please use **BLOCK LETTERS** in **BLACK OR BLUE PEN ONLY** and  tick required choices

## STEP 1 – INVESTMENT(S) DETAILS

Investment name

Investment number

Investment name

Investment number

I/we wish to inform Uniting Financial Services that I/we have authorised the following person(s) whose signature(s) appear(s) below to exercise all my/our rights (other than the right to grant any of those rights to another person) in respect of the investment(s) listed above.

## STEP 2 – PERSON(S) AUTHORISED TO OPERATE ON INVESTMENT(S)

I/we authorise the person(s) named below, understand that the law requires signatories to state all the names by which they are commonly known and prohibits the use of false names. I/we declare that my particulars as shown on this form are complete and correct.

### DISCLAIMER FOR AUTHORISED PERSON(S)

The details I/we have provided in this application are true and correct. I/we have read, understood and accepted the terms and conditions (which may be amended from time to time by notice to me/us) as contained in the *Product Disclosure Statement* and *Product Information Brochure* (offer documents). I/we consent to the collection, use and disclosure of my/our personal information as detailed in the offer documents and the *Financial Services Guide*.

1. Title Full name



Residential address

State

Postcode

Postal address (if different from above)

State

Postcode

Telephone

Date of birth

 /  / 

Uniting Online:  Yes  No

Authorised signatory 1

Date

 /  / 

LIST ADDITIONAL SIGNATORIES ON NEXT PAGE ►

STEP 1  STEP 2  STEP 3

## STEP 2 (CONTINUED) – PERSON(S) AUTHORISED TO OPERATE ON INVESTMENT(S)

2. Title  Full name

Residential address  State  Postcode

Postal address (if different from above)  State  Postcode

Telephone    Date of birth  /  /

Uniting Online:  Yes  No

Authorised signatory 2  Date  /  /

3. Title  Full name

Residential address  State  Postcode

Postal address (if different from above)  State  Postcode

Telephone    Date of birth  /  /

Uniting Online:  Yes  No

Authorised signatory 3  Date  /  /

4. Title  Full name

Residential address  State  Postcode

Postal address (if different from above)  State  Postcode

Telephone    Date of birth  /  /

Uniting Online:  Yes  No

DETAILS OF SIGNATORY CONTINUED ON NEXT PAGE ►

## STEP 2 (CONTINUED) – PERSON(S) AUTHORISED TO OPERATE ON INVESTMENT(S)

Authorised signatory 4

Date  /  /

## STEP 3 – AUTHORISATION

I/we acknowledge that any operation on my/our investment(s) using Uniting Online and/or Uniting by Phone shall bind me/us jointly and severally to Uniting Financial Services's present and future Conditions of Use for these services, as the case may be.

I/we further acknowledge that any reference in the *Conditions of Use* for these services to 'you' and 'your' includes a reference to any third party authorised by me/us above to use these services in respect of my/our investment(s), with the intent that I/we shall be liable for any use in respect of my/our investment(s) and for any non-observance of those *Conditions of Use* by any such third party.





All previous authorities in respect of my/our above listed investment(s) as to authorised signatures are hereby cancelled except as regards instruments dated prior to the date hereof and presented for payment on or after such date.

I/we hereby request you to recognise and act upon this authority until Uniting Financial Services receives notice in writing of the cancellation thereof or until notice of the death of me/any one of us is received.

I/we acknowledge that Uniting Financial Services shall not be obliged to enquire into the circumstances of any instructions given to it in accordance with this authority and subject to the next sentence, is released from all liability for any loss or damage suffered by me/any of us as a result of Uniting Financial Services acting on this authority in good faith. Where Uniting Financial Services is supplying services to me/any of us as a consumer, as defined in the *Trade Practices Act 1974* ('the Act'), then nothing in this authority excludes, restricts or modifies any liability right or remedy imposed or conferred by the Act. However, to the extent permitted by the Act, any such liability of Uniting Financial Services is limited to the cost of supplying the services again.

### SIGNATURE(S) OF INVESTOR(S).

For investments in joint names all investors must sign for the authority to be valid.

	<b>Authorised signatory 1</b> <input type="text"/> <b>Print full name</b> <input type="text"/> Date <input type="text"/> / <input type="text"/> / <input type="text"/>		<b>Authorised signatory 2</b> <input type="text"/> <b>Print full name</b> <input type="text"/> Date <input type="text"/> / <input type="text"/> / <input type="text"/>
	<b>Authorised signatory 3</b> <input type="text"/> <b>Print full name</b> <input type="text"/> Date <input type="text"/> / <input type="text"/> / <input type="text"/>		<b>Authorised signatory 4</b> <input type="text"/> <b>Print full name</b> <input type="text"/> Date <input type="text"/> / <input type="text"/> / <input type="text"/>

### APPLICATION CHECKLIST

- Have you signed this application?
- Have all new authorised parties completed an *Identification and Verification Reference* form where required?
- Please ensure all steps are completed where required.

Financial services are provided by The Uniting Church (NSW) Trust Association Limited ACN 000 022 480, ABN 89 725 654 978, AFSL 292186 ("UCTAL") and by The Uniting Church in Australia Property Trust (NSW) ABN 77 005 284 605 ("UCAPT") (together and separately "Uniting Financial Services"), for The Uniting Church in Australia, Synod of NSW and the ACT ("Synod"), under s.911A Corporations Act 2001 (Cth.) authorisation and pursuant to APRA Banking Exemption No. 1 of 2017 and ASIC Regulatory Guide 87 and ASIC Corporations (Charitable Investment Fundraising) Instrument 2016/813 exemptions. Uniting Financial Services® is a registered trademark of UCTAL used with permission by UCAPT. None of The Uniting Church in Australia, UCAPT and UCTAL is prudentially supervised by APRA. Therefore, investments with and contributions to these Uniting Church organisations will not receive the benefit of the financial claims scheme or the depositor protection provisions in the Banking Act 1959 (Cth.). All financial services and products are designed for investors who wish to promote the religious and charitable purposes of Uniting Financial Services and The Uniting Church in Australia and for whom profit considerations are not of primary importance in their decision to invest.

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