

# Periodic Payment Application



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

- Periodic Payments can be initiated, amended and cancelled when set up via Uniting Online



## 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 – PLEASE TICK ONE

**New Periodic Payment** (Complete all steps)

**Change to existing Periodic Payment** (Complete all steps)

Request number (if available)

**Cancel Periodic Payment** (Complete steps 1, 2 and 5 only)

Request number (if available)

## STEP 2 – DETAILS

Investment name

Investment number

Amount to be paid

Amount in words

## STEP 3 – PERIODIC PAYMENT DETAILS

Commencement date

Frequency of payment (e.g. monthly)

Expiry date

OR

Until further notice

**STEP 1**  **STEP 2**  **STEP 3**  **STEP 4**  **STEP 5**

## STEP 4 – METHOD OF PAYMENT

Please tick one option and complete method of payment details

**Credit Uniting Financial Services Number**

Investment/Loan name

Reference to appear on both Uniting Financial Service investments (max 18 characters)

**Credit account with another financial institution**

Account name

Financial institution

Branch

BSB number

Account number

Our reference to appear on financial institution statement (max 18 characters)

Their reference to appear on Uniting Financial Service investments (max 18 characters)

## STEP 5 – AUTHORISATION

I/we acknowledge having received, read and understood the *Product Disclosure Statement* and the terms and conditions provided.

**Signatory 1**

SIGN HERE

**Print full name**

Date  /  /

**Signatory 2**

SIGN HERE

**Print full name**

Date  /  /

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.

STEP 1  STEP 2  STEP 3  **STEP 4**  STEP 5