

Application for Uniting Online/ Uniting by Phone



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

Uniting Financial Services
PO Box A2178
Sydney South NSW 1235



Helpful hints for completing this application

- New signatories on the investment (not already identified) are to complete an *Identification and Verification Reference* form.
- Please ensure all steps are completed where required.



Need help or have a question?

Call us on 1300 133 673

Visit us at unitingfinancial.com.au

Email us at contactus@unitingfinancial.com.au

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

STEP 1 – PLEASE TICK THE OPTIONS REQUIRED

Uniting Online (Complete steps 2, 3, 5 and if applicable step 6)

Uniting by Phone (Complete steps 2, 3, 4, and 5)

STEP 2 – YOUR DETAILS

Title Given names Surname

Postal address

Suburb State Postcode

Telephone Mobile Fax

Email

User ID

(Existing Client Only)

STEP 3 – DETAILS OF INVESTMENT(S)/LOAN(S) INVOLVED

Investment/loan name	Investment/loan number	Internet access <input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser
		<input type="checkbox"/> View Only	<input type="checkbox"/> Initiator	<input type="checkbox"/> Authoriser Only	<input type="checkbox"/> Initiator/Authoriser

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 – APPLICANT SIGNATURE

PRIVACY

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

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 notify you about, or seek feedback on, our products and services. If you don't want us to contact you, or to receive communication items, simply tick here: No thanks

SIGNATURE OF APPLICANT/SIGNATORY

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

SIGN HERE

Print full name

Date / /

STEP 6 – AUTHORISATION TO OPERATE ON INVESTMENT(S)/LOAN(S) SELECTED (CHURCH ORGANISATIONS ONLY)

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 access to the investments/loans listed in step 3.

SIGN HERE **Signatory 1**

Print full name

Date / /

SIGN HERE **Signatory 2**

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.

OFFICE USE ONLY

Choosing the appropriate profile.

Permissions allocated to each of the form profiles are as follows.

What can each Delegate Profile do?	<i>View Only</i>	<i>Initiator</i>	<i>Authoriser Only</i>	<i>Initiator/ Authoriser</i>
Process Batches	N	Y	N	Y
Process BPAY	N	Y	N	Y
Own Account Transfers	N	Y	N	Y
External Transfers	N	Y	N	Y
View Transaction List	View Only	View Only	View Only	View Only
Open eStatement	View Only	View Only	View Only	View Only
Within Institution Transfer	N	Y	N	Y
Access	Change Passcodes Only	All options available	Change Passcodes Only	All options available