

# Sweep Facility Application



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

- Sweeps work after all transactions have been processed at the end of each business day



### 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 – SWEEP DETAILS

Investment name

Investment number

Sweep details are  new  amend  cancellation

### PLEASE SELECT EITHER OR BOTH OF THE FOLLOWING SWEEP REQUIREMENTS

**Maintenance Sweep: Minimum balance to be maintained**

To maintain a minimum balance of \$  .  in the above Uniting Financial Services Investment,

please transfer funds from/investment number

**Surplus Sweep: Maximum balance to be maintained**

To maintain a maximum balance of \$  .  in the above Uniting Financial Services Investment,

please transfer surplus funds/to investment number

**Two-way Sweep: Minimum balance to be maintained**

To maintain a minimum balance of \$  .  and a maximum balance of \$  .

in the above Uniting Financial Services Investment, please transfer funds from/to investment number

**AUTHORISATION ON NEXT PAGE ▶**

**STEP 1** **STEP 2**

## STEP 2 – AUTHORISATION

I/We understand that although Uniting Financial Services will endeavour to effect such automatic transfers under this authority, it accepts no responsibility to make the same and accordingly Uniting Financial Services shall not incur any liability from failure to do so for any reason.

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

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