

Investment 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

- Church organisations should have this application form signed by two authorised representatives.
- 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 – YOUR ORGANISATION’S DETAILS

Already a Uniting Financial Services Investor? Please provide your investor I.D. and go to STEP 2 or complete the following details.

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Name of organisation

ABN (if applicable)

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Address

Suburb

State

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Postcode

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Postal address (if different from above)

Suburb

State

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Postcode

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Telephone

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Mobile

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Fax

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STEP 2 – INVESTMENT SELECTION

Please tick your choice(s) of investments from the following list

Fixed Term Investment

Opening amount

Number of months **OR** Date to mature / /

Interest paid At maturity (for terms less than 12 months) **OR** Annually and at maturity (for terms greater than 12 months)

At Call Investment

Opening amount

Giving Direct

Sales Proceeds

Self Help Settlement Facility

Purpose of Scheme

Scheme organiser's given names

Scheme organiser's last name

Address

Suburb

State

Postcode

Preferred contact telephone number

Preferred contact email address

Cheque Facility

Opening amount

Cheque book size Small Large

* A deposit book will be ordered and mailed to your nominated address.

Deposit book Yes No

Minister's Expense Facility

Cheque book required Yes No

Cheque book size Small Large

Minister's given names

Minister's last name

STEP 3 – OPTIONAL – NAME YOUR INVESTMENT

If you would like to allocate a specific name to your investment, please write that name here e.g. Bequest or leave blank

STEP 4 – YOUR INTEREST PAYMENT DETAILS

Add interest to this investment **OR** Pay interest to Uniting Financial Services investment number

STEP 5 – FUNDING YOUR NEW INVESTMENT



• If you are funding investments by cheque please make the cheque payable to the Applicant applying for this investment.

CHEQUE PAYMENT

Please draw upon enclosed cheque, value \$

DIRECT DEBIT REQUEST

Please complete and sign the Direct Debit Request below to enable the opening investment to be withdrawn from your existing investment with either Uniting Financial Services or with another financial institution. Terms and conditions for Direct Debit Request are contained in the *Product Disclosure Statement*, available on our website unitingfinancial.com.au

I/We authorise Uniting Financial Services (Debit User Number 126 416) to debit the amount of \$ as detailed below.

Uniting Financial Services investment number

OR

Another financial institution account

Account name

Financial institution

Branch

BSB number

Account number

Authorised signatory of the above mentioned investment

SIGN HERE

Date

Authorised signatory of the above mentioned investment

SIGN HERE

Date

This section must be signed in accordance with the signing authority recorded for the investment or account being debited.

STEP 6 – DETAILS OF AUTHORISED SIGNATORIES FOR INVESTMENT(S)



- If Uniting Online is required, the User ID and Passcode will be separately mailed to the postal address held by Uniting Financial Services.
- All new signatories not identified by Uniting Financial Services must complete an *Identification and Verification Reference* form.
- **Please note:** Person listed as contact 1 will receive all investment/loan correspondence from Uniting Financial Services.

We acknowledge having received, read and understood the *Financial Services Guide*, *Product Disclosure Statement* and the *Product Information Brochure*.

1. Full name Position (if applicable)

Residential address

Postal address

Email Phone (Home or Work)

Authorised signatory 1 Mobile

Date / /

2. Full name Position (if applicable)

Residential address

Postal address

Email Phone (Home or Work)

Authorised signatory 1 Mobile

Date / /

* Available for At Call Investments only. Daily limit of \$5000 per investment for transfers to accounts with external financial institutions applies. To apply for an increased limit, please complete an *Application for access to Uniting Online / Uniting by Phone*.

STEP 6 (CONTINUED) – DETAILS OF AUTHORISED SIGNATORIES FOR INVESTMENT(S)

3. Full name Position (if applicable)

Residential address

Postal address

Email Phone (Home or Work)

Authorised signatory 1 Mobile

Date / /

4. Full name Position (if applicable)

Residential address

Postal address

Email Phone (Home or Work)

Authorised signatory 1 Mobile

Date / /

5. Full name Position (if applicable)

Residential address

Postal address

Email Phone (Home or Work)

Authorised signatory 1 Mobile

Date / /

* Available for At Call Investments only. Daily limit of \$5000 per investment for transfers to accounts with external financial institutions applies. To apply for an increased limit, please complete an *Application for access to Uniting Online / Uniting by Phone*.

UNITING ONLINE ACCESS

List names and access levels to those people requiring Uniting Online Access.

Name:	View Only	Initiator	Authoriser	Initiator/Authoriser
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STEP 7 – OPERATING INSTRUCTIONS FOR INVESTMENTS



• If this section is not completed ALL applicants must sign.

Any 2 to sign

STEP 8 – AUTHORISED SIGNATORIES TO SIGN HERE

Authority has been duly given by Resolution passed at a legally constituted Meeting of Committee Members of the Uniting Church organisation in accordance with the Rules [where applicable] for the opening and operation of the investment(s) in the name set out in this application. We are authorised to open the abovementioned investment(s) with Uniting Financial Services.

We undertake to provide Uniting Financial Services with such additional information or documentation as Uniting Financial Services may request at any future time to ensure compliance with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*. The details we have provided in this application are true and correct. We have read, understood and accepted the terms and conditions as contained in the *Financial Services Guide*, *Product Disclosure Statement* and the *Product Information Brochure*.

We understand and acknowledge investments managed by The Uniting Church (NSW) Trust Association Limited and The Uniting Church in Australia Property Trust (NSW) are used to promote the charitable purposes and support the work of The Uniting Church in Australia, Synod of NSW and the ACT.

PRIVACY

I/We acknowledge and consent to the collection, use and disclosure of my/our personal information as detailed in the Privacy Acknowledgement & Consent Form provided with this application, the Privacy Policy, *Financial Services Guide*, *Product Disclosure Statement* and the *Product Information Brochure*. I/We acknowledge receipt of the Privacy Policy which is also available on unitingfinancial.com.au

	<p>Authorised signatory 1</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>Print full name</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>Date <input type="text" value="DD"/> / <input type="text" value="MM"/> / <input type="text" value="YYYY"/></p>		<p>Authorised signatory 2</p> <div style="border: 1px solid black; height: 40px; width: 100%;"></div> <p>Print full name</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>Date <input type="text" value="DD"/> / <input type="text" value="MM"/> / <input type="text" value="YYYY"/></p>
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APPLICATION CHECKLIST

- Have you got 2 authorised representatives signatures?
- Have all parties signed this application?
- Have all new signatories completed an *Identification and Verification Reference form*.
- 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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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	Y	Y
Process BPAY	N	Y	Y	Y
Own Account Transfers	N	Y	Y	Y
External Transfers	N	Y	Y	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	Y	Y
Access	Change Passcodes Only	All options available	Change Passcodes Only	All options available