

Identification and Verification Reference form (Individuals)

IMPORTANT INFORMATION FOR INVESTORS – PLEASE READ

Anglican Financial Services (ANFIN) is owned and operated by The Corporation of the Synod of the Diocese of Brisbane ("Anglican Church Southern Queensland"). Neither the Anglican Church Southern Queensland nor ANFIN is prudentially supervised by the Australian Prudential Regulation Authority ("APRA"). Contributions to ANFIN do not obtain the benefit of the depositor protection provisions of the *Banking Act 1959* (Cth). The normal protections that would apply under the *Corporations Act* do not apply. ANFIN's investment products have not been examined or approved by the Australian Securities and Investments Commission ("ASIC"). Investors should be aware that ANFIN is not subject to the normal requirement to have a disclosure document or Product Disclosure Statement and be registered or have a trust deed under the *Corporations Act*. ANFIN is designed for investors who wish to promote the charitable purposes of the Anglican Church Southern Queensland and for whom the considerations of profit are not of primary relevance in the investment decision. ANFIN recommends that you obtain your own financial advice before making an investment with ANFIN.

This form may be lodged by:

Post

GPO Box 421 Brisbane QLD 4001

In Person

373 Ann Street, Brisbane QLD 4000

Helpful hints for completing this application:

- This form must be completed for all Individuals who will be Authority to Operate Signatories and must be signed by an 'Authorised Certifier'.
- An 'Authorised Certifier' is required to provide their details on this form. Without this information ANFIN are unable to accept this form.
- In order for document certification to be accepted by ANFIN, the Authorised Certifier must sight the original document. If there are multiple pages, each must be certified and signed by the certifier. The investor should attach the certified copies to this form and provide them to ANFIN (via post or in person). **Facsimile or scanned copies will not be accepted.**
- An Authority to Operate Signatory is an individual, nominated by an organisation and approved by existing Authority to Operate Signatories, who can authorise ANFIN to initiate transfers, make enquiries and make changes relating to the organisation's ANFIN investments.

List of Authorised Certifiers:

- Person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia as a legal practitioner
- Police Officer
- Justice of the Peace
- Judge of a Court
- Registrar or Deputy Registrar of a court
- Notary Public (for the purposes of the Statutory Declaration Regulations (1993))
- Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- Permanent employee of the Australian Postal Corporation with two or more years continuous service who is employed in an office supplying postal services to the public
- Australian consular officer or an Australia diplomatic officer
- Officer with two or more continuous years of service with one or more financial institutions
- Finance company officer with two or more continuous years of service with one or more finance companies
- Officer with, or authorised representative of, a holder of an Australian Financial Services Licence, having two or more continuous years of service with one or more licencees
- Member of the Institute of Chartered Accountants in Australian, CPA Australia or the National Institute of Accountants with two or more years of continuous membership.

