

Investment Application form

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

Fax

(07) 3835 2299

Email

askus@anfin.com.au

Helpful hints for completing this application:

- Allow two business working days for your request to be processed.
- If you answer No at Step 1 you must complete an *Identification and Verification Reference form*.
- If an Authority to Operate Signatory is new to the organisation you must complete an *Identification and Verification Reference form* before you can sign this form.
- Two Authority to Operate Signatories must sign this form.
- 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.

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

STEP 1 – YOUR DETAILS

Are you already an ANFIN client?

Yes Please provide:-

Client name

Client number

No Please complete an *Identification and Verification Reference form*

STEP 2 – YOUR ORGANISATION TYPE

Anglican affiliated body

Anglican parish

Anglican school

Other

STEP 3 – INVESTMENT SELECTION

Please tick your choice of investment

Fixed Term Investment

Opening amount \$

Term in months

or Maturity date

Special instructions

Interest paid (tick one)

6 monthly on maturity

Easy Access investment

Opening amount \$

Stationery Deposit book Number of books (50 leaf)

ANFINCheq (Available only for Anglican parishes & Anglican organisations)

Opening amount \$

Stationery Deposit book Number of books (50 leaf)

Stationery Cheque book Number of books (50 leaf)

Please complete a Cheque Account Specimen Signature card

The signatories on this card will only be able to sign cheques. They are not an Authority to Operate on this investment.

Each person whose name and specimen signature appears on the Cheque Account Specimen Signature card is authorised to act (please tick one):

- Severally
- Jointly with any other authorised signatory
- Severally up to an amount of \$ _____ and jointly with any other signatory thereafter;

to draw, make, accept, endorse or discount cheques (please tick one);

- Severally Jointly with any other authorised signatory

to countermand payments of cheques and other instruments;

to endorse cheques payable to or to the order of the organisation and lodged for the credit of any of the accounts.

APPLICANT'S DECLARATION

We ("The Client"), apply to join ANFINCheq ("The Client's Cheque Scheme") described in this application form in relation to our account with ANFIN.

We accept and agree to be bound by the Terms and Conditions of ANFINCheq, a copy of which has been read and understood by me/us.

STEP 7 – DETAILS OF AUTHORITY TO OPERATE SIGNATORIES FOR INVESTMENT

By signing this form, I acknowledge that I have been provided with, and have read and understood, the ANFIN Terms and Conditions. The Terms and Conditions may be viewed at any time by visiting www.anfin.com.au and clicking on 'Resources'.

Enter each signatory you wish to have Authority to Operate rights on this account

1. Full name & position (if applicable)		Signature	ANFIN online - Existing Users
			Please add to current ANFIN Log on <input type="checkbox"/> Yes <input type="checkbox"/> No
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
2. Full name & position (if applicable)		Signature	ANFIN online - Existing Users
			Please add to current ANFIN Log on <input type="checkbox"/> Yes <input type="checkbox"/> No
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
3. Full name & position (if applicable)		Signature	ANFIN online - Existing Users
			Please add to current ANFIN Log on <input type="checkbox"/> Yes <input type="checkbox"/> No
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
4. Full name & position (if applicable)		Signature	ANFIN online - Existing Users
			Please add to current ANFIN Log on <input type="checkbox"/> Yes <input type="checkbox"/> No
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
5. Full name & position (if applicable)		Signature	ANFIN online - Existing Users
			Please add to current ANFIN Log on <input type="checkbox"/> Yes <input type="checkbox"/> No
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form

STEP 8 – EXTERNAL ACCOUNT DETAILS

Please provide the details of your bank account.

Financial institution _____ Branch _____

BSB number _____ Account number _____

STEP 9 – AUTHORISATION FOR INVESTMENT

By signing this form:

- I acknowledge that I have been provided with, and have read and understood, the ANFIN Terms and Conditions. The Terms and Conditions may be viewed at any time by visiting www.anfin.com.au and clicking on 'Resources'.
- I consent to the collection, use and disclosure of my/our personal information in accordance with the Privacy set out in the ANFIN Terms and Conditions and the Anglican Church Southern Queensland's privacy-policy, a copy of which can be obtained online at <https://anglicanchurchsq.org.au/privacy/> or by calling (07) 3835 2355.

Owner/ Authority to Operate Signatory 1

Owner/ Authority to Operate Signatory 2

Print full name _____

Print full name _____

Date _____ Client number _____

Date _____ Client number _____

Office Use Only

- Verified Owner/Authority to Operate Signatory 1 and 2
- Applied Investment class
- Created/Amended ATOs in system
- Client verification process completed (if required)
- Chq Spec form mailed to Indue (if required)
- Processed funding as per instructions
- Original document stored in filing room
- Filed electronically

RIM.....
DATE
DOC TYPE: OPENING NEW ACCOUNT.....
.....
ACCOUNT
REFERENCE
.....
INITIAL

Processed by: _____ Date: _____

Reviewed by: _____ Date: _____