

Term Investment Account Application Form

For completion by Individual/s or Organisations

PART A

Please open a new Term Investment Account.

Term of Account (tick one) 6 months 1 year 18 months 2 years

Individual / Joint Account

Account Holder 1 – Title Surname

Given Name/s

Account Holder 2 – Title Surname

Given Name/s

Organisation / Entity Account

Name of Organisation/Entity

Address (for statements)

Street

Suburb Postcode

Contact Details

Contact Name Phone (day)

Fax (day) Email

Interest

Interest Frequency (tick one) At Maturity Yearly Half Yearly Quarterly (One Year Term or longer)

Please note that interest can only be paid at maturity when reinvested.

I / We wish interest earnings to be (tick one)

Reinvested (at maturity only)

Transferred to financial institution account – please complete all details

Transferred to ADF account – please complete account name & number only

Financial Institution / ADF Account Details

(for interest payments)

Account Name

Bank Name

BSB

Acct No

Parish Support

I / We wish our investment to be allocated in support of (Parish)

I / We attend the following Parish (if applicable)

Authority To Operate On Account

For organisation accounts with multiple signatories, please complete separate *Authority to Operate Accounts* form.

(Tick one) Either to sign Both to sign

Account Holder 1 Signature Account Holder 2 Signature

Tax and Deeming

Tax File No. Account Holder 1 Tax File No. Account Holder 2

Date of Birth / / (required for under 16 exemption only) Organisation ABN

Tax File Number / Australian Business Number – Number(s) will be destroyed once recorded. Government legislation requires that the ADF deduct taxation at the top marginal rate, plus Medicare levy, from interest earned if the depositor does not provide a tax file number or ABN or is not exempt. Any tax deducted will be sent to the Australian Tax Office. If the individual or organisation/entity is exempt from Australian taxation, please write *Exempt* in the appropriate space. Please provide date of birth where the investor is under 16 and exempt from Australian taxation.

Deeming (applies to some Centrelink pensions & allowances). The Anglican Development Fund is structured so that a proportion of the fund is separate from Government deeming provisions. If an exemption from deeming provisions would assist you, please tick this box, and we will establish your account in the deeming-exempt part of the Fund.

PART B

Please open the account with the sum of:

(Amount in words) (Amount in figures) \$

(Tick one) Enclosed is my / our cheque (payable to the ADF), or Enclosed is my / our completed Electronic Transfer Request. This form is available from the ADF office or is downloadable from www.anglicanfunds.com.au (NB: minimum investment \$1,000.00)

For a copy of the Terms and Conditions applicable to this account, please phone the ADF on (03) 9653 4220.

Alternatively, the Terms and Conditions may be downloaded from www.anglicanfunds.com.au

After completing this Application Form, please forward with your cheque or Electronic Transfer Request to:

Anglican Development Fund, Reply Paid 70597, Melbourne Vic 3000 (No stamp is required)