

investment amendments

account details

PLEASE NOTE: Each account owner must be a shareholding member of Credit Union SA Ltd. The first named member (1) shall be deemed the Primary owner when calculating the value of a personal portfolio.

account number _____

maturity date _____

investment amount \$ _____

personal account

(1) full name _____

member number _____

contact phone number _____

(2) full name _____

member number _____

contact phone number _____

non-personal account in the name of _____

change of interest payment instructions

reinvest - only available for accelerator investments

credit interest to Credit Union SA account number _____

external transfer

account number _____

BSB number _____

account name _____

post cheque to account owner(s)

maturity re-investment instructions

reinvest full amount

reinvest partial amount - *complete withdrawal instruction in redemption section for amount not being re-invested*

reinvest full amount plus additional funds

new investment required:

fixed term investment

regular income term investment

accelerator 12 mth term investment

accelerator 24 mth term investment

accelerator retirement 12 mth term investment

retirement regular income term investment

term _____ interest rate _____ %

interest frequency _____

total amount for reinvestment \$ _____

source of additional funds:

cash \$ _____

cheque(s) \$ _____

debit account number _____ \$ _____

debit account number _____ \$ _____

TOTAL \$ _____

interest payment instructions:

reinvest - only available for accelerator investments

credit interest to Credit Union SA account number _____

external transfer

account number _____

BSB number _____

account name _____

post cheque to account owner(s)

redemption of investment (early or at maturity)

withdraw total investment at maturity

withdraw partial investment at maturity

amount required \$ _____

early withdrawal (before maturity date)

please state reason required below (minimum 24 hours notice)
Note: an interest penalty may apply for this early withdrawal

date required _____

amount required \$ _____
(minimum amount \$1,000)

payment of funds:

credit interest to Credit Union SA account number _____

external transfer

account number _____

BSB number _____

account name _____

post cheque to account owner(s)

post cheque to _____

signature(s)

signature (1) _____ date _____

signature (2) _____ date _____

office use only

signature(s) verified by: _____

taken by: _____

branch: _____ date: _____

processed by: _____

cheque number (if applicable) _____