

account details

PLEASE NOTE: Each account owner must be a share-holding 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.

personal account

(1) member no. _____ full name _____

(2) member no. _____ full name _____

account number _____ maturity date _____

non-personal account

member number _____ entity name _____

account number _____ maturity date _____

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
- special term investment (limited offer)
- regular income term investment
- retirement regular income term investment
- accelerator 12 mth term investment
- accelerator retirement 12 mth term investment
- accelerator 24 mth 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)

continue overleaf.....

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)
penalty amount \$ _____

payment of funds:

- credit to Credit Union SA account number _____
- external transfer
account number _____
BSB number _____
account name _____
- post cheque to account owner(s)
- post cheque to _____

change of interest payment instructions ONLY

- reinvest - only available for accelerator investments
- external transfer - account number _____ BSB number _____ account name _____
- credit to Credit Union SA account number _____
- post cheque to account owner(s)

signature(s)

signature (1) _____

member no. _____

date _____

signature (2) _____

member no. _____

date _____

signature (3) _____

member no. _____

date _____

signature (4) _____

member no. _____

date _____

office use only

signature(s) verified by: _____

processed by: _____

taken by: _____

cheque number (if applicable) _____

branch: _____ date: _____