

## sms alerts

monitor your accounts via your mobile phone number:

\_\_\_\_\_

new  amendment  cancel alert  cancel service

debit fees from this account: \_\_\_\_\_

I require "On Demand" SMS only

Please set-up the following SMS "Event Alerts"

Direct Debit Received

Direct Credit Received

Account Balance on -

Account No: \_\_\_\_\_

Low amount: \$ \_\_\_\_\_ and/or

High amount: \$ \_\_\_\_\_

Account Balance on -

Account No: \_\_\_\_\_

Low amount: \$ \_\_\_\_\_ and/or

High amount: \$ \_\_\_\_\_

Scheduled Balance on -

Account No: \_\_\_\_\_

Start Date: \_\_\_\_\_

Time: \_\_\_\_\_ am / pm

Daily  Weekly

Fortnightly  Monthly

Scheduled Balance on -

Account No: \_\_\_\_\_

Start Date: \_\_\_\_\_

Time: \_\_\_\_\_ am / pm

Daily  Weekly

Fortnightly  Monthly

## declaration

- I/we acknowledge that I/we have received the Conditions of Use Savings & Investments Accounts relating to the account(s) chosen and Conditions of Use Electronic & General Access Services for the service(s) chosen and agree to abide by these conditions of use.
- In reference to joint accounts, I authorise being a joint owner in the account(s) selected.

signature (1) \_\_\_\_\_ date \_\_\_\_\_

signature (2) \_\_\_\_\_ date \_\_\_\_\_

### office use only

#### SECTION 1 - to be completed by staff accepting application

signature verified

COU's provided & logged in prosper *(if applicable)*

fees & charges & interest rate schedule provided

taken by \_\_\_\_\_

branch \_\_\_\_\_

date \_\_\_\_\_

#### SECTION 2 - to be completed by staff processing application

confirmation letter sent for

internet banking

phone banking

access code

processed by \_\_\_\_\_

date \_\_\_\_\_

#### SECTION 3 - to be completed by card services clerk

card ordered - date \_\_\_\_\_

## new accounts & access services

## new 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.

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

\_\_\_\_\_

member number \_\_\_\_\_

## account selection

Conditions of use apply to these accounts. Details are available on request or will be provided at the time of your application. Please tick the accounts you require.

everyday account

online savings account

christmas savings account

bonus savings account

childrens savings account

tertiary students account

retirement deeming account

100% off-set account

cash management account

A First Home Saver account requires a separate application form.

## access authority

If this is a joint account

either to sign     both to sign

also indicate which account owners are to receive statements:

primary account owner     joint owner     both

Note: primary account owner (1) will appear first on the account details of joint accounts.

## cards

Cards and PINs will be sent by separate mail. Visa Card is not available on accounts where multiple signatures are required to transact.

Redicard

VISA debit card

previous residential address if less than 3 years at current address

\_\_\_\_\_

State whether you are currently  buying  renting  own home

length of years at this residence \_\_\_\_\_

employer name & address \_\_\_\_\_

\_\_\_\_\_

occupation \_\_\_\_\_

length of service \_\_\_\_\_ work ph no. \_\_\_\_\_

type of employment \_\_\_\_\_

full-time     perm part-time     casual     other

drivers lic no. \_\_\_\_\_ expiry date \_\_\_\_\_

## linking accounts -

1st savings \_\_\_\_\_  
full access from eftpos, bank@post and all atms

2nd savings \_\_\_\_\_  
access from rediATMs & bank@post

3rd savings \_\_\_\_\_  
access from rediATMs only

loan account \_\_\_\_\_  
access for deposits at bank@post only

visa posting account \_\_\_\_\_  
access for visa card purchases only

## access & service options

full name \_\_\_\_\_

member number \_\_\_\_\_

Conditions apply to the use of these options. Details are available on request or will be provided at the time of your application. Please tick the options you require.

**access code** - to access account(s) via the phone to the member service centre. Select any combination of 4 to 8 characters & numbers. **DO NOT** use dates of birth, phone numbers etc as it opens the possibility of fraud on your account.

**online access** - internet banking, BPay - we will provide your initial internet banking password.

**eStatements** via internet banking  
email address for notification: \_\_\_\_\_

**phone banking & BPay** - we will provide your initial phone banking password.

**sms alerts** - complete sms alerts section overleaf.

**payroll & direct credit** - attach a completed payroll authority (F238).

**lending product** - attach a completed loan application (L001).

**cheque book** - attach a completed cheque account signatory card (F023)

link cheque facility to account \_\_\_\_\_

30 leaf book     100 leaf book

## tax file number

The quoted **tax file number** (TFN) will be linked to all accounts under this membership. Members who do not quote a TFN or exemption number may be subject to TFN Withholding Tax. This notice will be destroyed once details are entered. These details cannot be retrieved or accessed by staff.

\_\_\_\_\_

(1)

(2)