

**new 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 and will appear first on the account details of joint accounts.

**personal account**

member number (1) \_\_\_\_\_ contact phone number \_\_\_\_\_  
 full name \_\_\_\_\_  
 member number (2) \_\_\_\_\_ contact phone number \_\_\_\_\_  
 full name \_\_\_\_\_

**non-personal account**

member number \_\_\_\_\_ name of entity \_\_\_\_\_

**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                       bonus savings account                       online savings account
- christmas savings account                       childrens savings account                       tertiary student account
- association account                       retirement deeming account                       cash management account

**access authority - for joint account or non-personal account**

- either to sign                       both to sign                       other (please specify) \_\_\_\_\_

if this is a joint account please indicate which account owners are to receive statements:

- account owner (1)                       account owner (2)                       both

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

*please ensure you sign the declaration overleaf*

**new access & service options**

*if more than one member requires new access & services each member must complete a separate form*

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 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 -  PIN not required

- VISA debit card - *conditions may apply*

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 licence no. \_\_\_\_\_ expiry date \_\_\_\_\_

**linking accounts to your card -**

1st savings \_\_\_\_\_ 2nd savings \_\_\_\_\_ 3rd savings \_\_\_\_\_  
full access eftpos, bank@post and all atms                      access from rediATMs & bank@post                      access from rediATMs only

loan account \_\_\_\_\_ visa posting account \_\_\_\_\_  
access for deposits at bank@post only                      access for visa card purchases only

**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.

- 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.

- Internet banking & BPAY** - we will provide your initial internet banking password. 'Secure SMS' is a second level of security offered within internet banking. If you register for Secure SMS, your mobile phone number is required to receive a 'Secure SMS' code. This code enables you to complete certain transactions such as BPAY, external transfers and cheque withdrawals.

**Mobile Phone number:** \_\_\_\_\_

- 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 below.
- Payroll & Direct Credit** - attach a completed payroll authority (F238).
- Cheque Book** - attach a completed cheque account signatory card (F023)     30 leaf book     100 leaf book
- link cheque facility to account \_\_\_\_\_

**sms alerts**

monitor your accounts via your mobile phone number: \_\_\_\_\_

- new     amendment     cancel alert     cancel service

- 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 agree to abide by these conditions of use.
- In reference to joint accounts, I authorise being a joint owner in the account(s) selected.
- In reference to non-personal accounts I/we confirm that I/we are authorised to open and operate this new account.

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

signature (3) \_\_\_\_\_ date \_\_\_\_\_

name \_\_\_\_\_ member no \_\_\_\_\_

name \_\_\_\_\_ member no \_\_\_\_\_

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

signature (4) \_\_\_\_\_ date \_\_\_\_\_

name \_\_\_\_\_ member no \_\_\_\_\_

name \_\_\_\_\_ member no \_\_\_\_\_

**office use only**

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

- signature verified     tertiary student ID sighted
- COU's provided & logged     fees&charges & int rates provided

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

date \_\_\_\_\_

account numbers opened: \_\_\_\_\_

\_\_\_\_\_

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

confirmation letter -  Int Bkg     Ph Bkg     Acc Code

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

**SECTION 3 - ViSA debit card authorisation (if applicable)**

- all checks completed     approved     declined

by \_\_\_\_\_ date \_\_\_\_\_

**SECTION 4 - to be completed by card services clerk**

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