

# New account(s) and Access services



## Member details

### Personal account

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

Member number (1) \_\_\_\_\_

Member number (2) \_\_\_\_\_

Full name \_\_\_\_\_

Full name \_\_\_\_\_

Contact phone number \_\_\_\_\_

Contact phone number \_\_\_\_\_

Email \_\_\_\_\_

Email \_\_\_\_\_

### 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.

- Access Account
- Children's Savings Account
- Bonus Savings Account
- Netsave Account
- 55+ Account
- Association Account

### Access authority - for joint account or non-personal account

- Any to sign
- Any two to sign
- All to sign

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

- Account owner (1)
- Account owner (2)
- Both

### Tax file number or Exemption

Quoting your Tax File Number (TFN) or Exemption is not compulsory but failing to do so may result in Withholding Tax being deducted from interest earned. The quoted TFN or Exemption will be linked to all accounts under your membership.

Member (1) TFN or Exemption \_\_\_\_\_ Member (2) TFN or Exemption \_\_\_\_\_

**Please ensure you sign the declaration overleaf**

## New access and service options

**Access card** - Card and PIN will be sent by separate mail.

- Visa debit card
- rediCard

### Linking accounts to your card -

1st account \_\_\_\_\_  
Full access EFTPOS, Bank@Post and all atms

2nd account \_\_\_\_\_  
Access from rediATMs & Bank@Post

Loan account \_\_\_\_\_  
Access for deposits at Bank@Post only

Visa posting account \_\_\_\_\_  
Access for visa card purchases only

- Access code** - to access account(s) via the phone to the Member Contact Centre. Select any combination of 4 to 8 letters & numbers. **Do not** use dates of birth, phone numbers etc as it opens the possibility of fraud on your account.

Code \_\_\_\_\_

- Internet banking** - we will provide your initial password. **eStatements** -

Email \_\_\_\_\_  
which is my  Home email  Work email

- Phone banking** - we will provide your initial password.

**Access card** - Card and PIN will be sent by separate mail.

- Visa debit card
- rediCard

### Linking accounts to your card -

1st account \_\_\_\_\_  
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- Access code** - to access account(s) via the phone to the Member Contact Centre. Select any combination of 4 to 8 letters & numbers. **Do not** use dates of birth, phone numbers etc as it opens the possibility of fraud on your account.

Code \_\_\_\_\_

- Internet banking** - we will provide your initial password. **eStatements** -

Email \_\_\_\_\_  
which is my  Home email  Work email

- Phone banking** - we will provide your initial password.

**New access and service options continued...**

Member (1)

- SMS Alerts - complete relevant sections below.  
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

Member (2)

- SMS Alerts - complete relevant sections below.  
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 have received the *Deposit Accounts and Access Services Terms and Conditions* for the account(s) and service(s) chosen and agree to abide by these terms and conditions.
- 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 \_\_\_\_\_

Name \_\_\_\_\_ Member No. \_\_\_\_\_

Signature (3) \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Member No. \_\_\_\_\_

Signature (2) \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Member No. \_\_\_\_\_

Signature (4) \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_ Member No. \_\_\_\_\_

**Office use only**

**Section 1** – to be completed by staff accepting application

- Signature verified    Fees and charges schedule provided
- T&C's provided and logged    Interest rate schedule provided

Taken by \_\_\_\_\_ Branch \_\_\_\_\_

Date \_\_\_\_\_

Account numbers opened: \_\_\_\_\_

\_\_\_\_\_

**Section 2** – to be completed by staff processing application

- Confirmation SMS/letter -  Internet banking    Phone banking  
 Access code

- Card ordered (if applicable)

Processed by \_\_\_\_\_ Date \_\_\_\_\_