

# New Investment Application

Uniting Church Organisations ONLY

**Please return this form to (no stamp required): UC Invest, Reply Paid 2145, Adelaide SA 5001**

Before making a decision to invest with us, you should read and understand the information contained in our **Product Information Guide** and **Electronic & General Access Guide**. These documents explain the terms and conditions of our products, including key features, risks and potential costs.

**If you are completing a printed hard copy of this form, please print in BLOCK LETTERS using BLACK or BLUE ink.**

## 1. Organisation Details

Full Name of Organisation \_\_\_\_\_

ABN \_\_\_\_\_

Location Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Statement Address (if different to above) \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

OFFICE USE ONLY CODE \_\_\_\_\_ LE \_\_\_\_\_

## 2. Investment Details

Please select from the following choices:

**Fixed Term Investment**

Nickname (eg. Building Fund) \_\_\_\_\_ Opening Balance **Minimum \$1,000**

\$ \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_

For \_\_\_\_\_ months **OR** to mature on DD / MM / YYYY at \_\_\_\_\_ % pa

**INTEREST PAYMENT OPTIONS**

Add to this investment **OR**  Pay interest to my/our UC Invest account: \_\_\_\_\_

Pay interest to my/our **Nominated Account** with another financial institution

**Note: Please ensure you complete your Nominated Account details in Section 3.**

**Easy Access Cheque Account** Interest will be credited to your account on the last day of each month

Nickname (eg. Building Fund) \_\_\_\_\_ Opening Balance **No minimum balance**

\$ \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_

Cheque book size:  50 Forms  100 Forms **Deposit book required:**  Yes  No

**eSaver Online (at call)** Interest will be credited to your account on the last day of each month

Nickname (eg. Building Fund) \_\_\_\_\_ Opening Balance **No minimum balance**

\$ \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_

**UC Invest Share Fund** Income distributions are calculated on the last day of each calendar quarter

Opening Balance **Minimum \$5,000**

\$ \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_

**INCOME PAYMENT OPTIONS**

Reinvest in additional Share Fund units **OR**  Pay income to my/our UC Invest account: \_\_\_\_\_

Pay income to my/our **Nominated Account** with another financial institution

**Note: Please ensure you complete your Nominated Account details in Section 3.**

**UC Invest Property Fund** Income distributions are calculated on the last day of each calendar quarter

Opening Balance **Minimum \$5,000**

\$ \_\_\_\_\_ , \_\_\_\_\_ , \_\_\_\_\_ . \_\_\_\_\_

**INCOME PAYMENT OPTIONS**

Reinvest in additional Property Fund units **OR**  Pay income to my/our UC Invest account: \_\_\_\_\_

Pay income to my/our **Nominated Account** with another financial institution

**Note: Please ensure you complete your Nominated Account details in Section 3.**

### 3. Nominated Account

A **Nominated Account** is your external account at another financial institution where we will:

1. Send interest payments from your fixed term investment (if requested in Section 2 above)
2. Debit your investment's opening balance (if requested in Section 4 below)
3. Debit or credit an amount requested via the Telephone Transfer Service (if you are registered to use this service)

The TTS uses a standing Direct Debit Request which authorises UC Invest to debit funds from your Nominated Account to this investment. The Terms and Conditions for Direct Debit Requests and the TTS are contained in the UC Invest Electronic & General Access Guide which is available on our website [ucinvest.com.au](http://ucinvest.com.au).

Financial Institution

Branch

\_\_\_\_\_

\_\_\_\_\_

Account Holder(s) Must be held in the same name as the account holder

\_\_\_\_\_

BSB Must be 6 digits

Account Number Maximum 9 digits

\_\_\_\_\_ - \_\_\_\_\_

\_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_

### 4. Method of Initial Investment

Cheque

Please make cheque payable to the applicant applying for this investment.

Direct Debit Request

Please complete and sign the Direct Debit Request below to enable the opening balance amount(s) listed in Section 2 to be withdrawn from an existing account at either UC Invest or another financial institution. The Terms and Conditions for Direct Debit Requests are contained in the UC Invest **Electronic & General Access Guide** which is available on our website [ucinvest.com.au](http://ucinvest.com.au).

I/We request and authorise UC Invest (an activity of The Uniting Church in Australia Property Trust (S.A.) ABN 25 068 897 781, Debit User ID 186213 / 332875) to debit the opening investment amounts detailed in Section 2, from my/our account listed below:

**Note: The Direct Debit Request must be signed by authorised signatories of the account being debited.**

From my/our UC Invest account: \_\_\_\_\_

From my/our **Nominated Account** listed in Section 3

From another financial institution:

Financial Institution

Branch

\_\_\_\_\_

\_\_\_\_\_

Account Holder(s) Must be held in the same name as the account holder

\_\_\_\_\_

BSB Must be 6 digits

Account Number Maximum 9 digits

\_\_\_\_\_ - \_\_\_\_\_

\_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_

Authorised signatory - SIGN BELOW

Authorised signatory - SIGN BELOW

Name

Name

\_\_\_\_\_

\_\_\_\_\_

#### IMPORTANT NOTE

Authorised signatories acknowledge having read, understood and accepted the terms and conditions of investments as outlined in the **UC Invest Product Information Guide** and the **Electronic & General Access Guide**.

All new signatories to UC Invest must complete an **Identity Verification Form** prior to being recognised as a signatory for the below investments.

**UC Invest Online (UCIO) and Telephone Transfer Service (TTS):** A daily withdrawal limit of \$5,000 per day applies for transfers to accounts with other financial institutions. To apply for an increase or decrease to this limit, please complete an **Account Access/Change of Details Form**.

## 5. Primary Contact Person & Authorised Signatories

### PRIMARY CONTACT PERSON

#### SIGNATORY 1

Title  Given Names

Surname

Date of Birth  /  /  Identification Password Maximum 12 characters

Residential Address

Suburb  State  Postcode

Home Phone  Mobile

Work Phone  Fax

Email

**UC Invest Online (UCIO)**

You must have a mobile phone registered to access UC Invest Online. Single use SMS codes are used to protect your security.

Full Access  Enquiry Only  Not Applicable

**Telephone Transfer Service (TTS)**

Transactions requested via the Telephone Transfer Service will only occur between this investment and your **Nominated Account** listed in **Section 3** of this application.

Full Access  Not Applicable

#### SIGNATORY 2

LE

Title  Given Names

Surname

Date of Birth  /  /  Identification Password Maximum 12 characters

Residential Address

Suburb  State  Postcode

Email

Mobile

**UC Invest Online (UCIO)**

You must have a mobile phone registered to access UC Invest Online. Single use SMS codes are used to protect your security.

Full Access  Enquiry Only  Not Applicable

**Telephone Transfer Service (TTS)**

Transactions requested via the Telephone Transfer Service will only occur between this investment and your **Nominated Account** listed in **Section 3** of this application.

Full Access  Not Applicable

#### SIGNATORY 3

LE

Title  Given Names

Surname

Date of Birth  /  /  Identification Password Maximum 12 characters

Residential Address

Suburb  State  Postcode

Email

Mobile

**UC Invest Online (UCIO)**

You must have a mobile phone registered to access UC Invest Online. Single use SMS codes are used to protect your security.

Full Access  Enquiry Only  Not Applicable

**Telephone Transfer Service (TTS)**

Transactions requested via the Telephone Transfer Service will only occur between this investment and your **Nominated Account** listed in **Section 3** of this application.

Full Access  Not Applicable

SIGNATORY 4

LE

Title \_\_\_\_\_ Given Names \_\_\_\_\_

Surname \_\_\_\_\_

Date of Birth       /       /             Identification Password Maximum 12 characters \_\_\_\_\_

Residential Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Email \_\_\_\_\_

Mobile \_\_\_\_\_

UC Invest Online (UCIO)

You must have a mobile phone registered to access UC Invest Online. Single use SMS codes are used to protect your security.

Full Access  Enquiry Only  Not Applicable

Telephone Transfer Service (TTS)

Transactions requested via the Telephone Transfer Service will only occur between this investment and your **Nominated Account** listed in **Section 3** of this application.

Full Access  Not Applicable

SIGNATORY 5

LE

Title \_\_\_\_\_ Given Names \_\_\_\_\_

Surname \_\_\_\_\_

Date of Birth       /       /             Identification Password Maximum 12 characters \_\_\_\_\_

Residential Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Email \_\_\_\_\_

Mobile \_\_\_\_\_

UC Invest Online (UCIO)

You must have a mobile phone registered to access UC Invest Online. Single use SMS codes are used to protect your security.

Full Access  Enquiry Only  Not Applicable

Telephone Transfer Service (TTS)

Transactions requested via the Telephone Transfer Service will only occur between this investment and your **Nominated Account** listed in **Section 3** of this application.

Full Access  Not Applicable

SIGNATORY 6

LE

Title \_\_\_\_\_ Given Names \_\_\_\_\_

Surname \_\_\_\_\_

Date of Birth       /       /             Identification Password Maximum 12 characters \_\_\_\_\_

Residential Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Email \_\_\_\_\_

Mobile \_\_\_\_\_

UC Invest Online (UCIO)

You must have a mobile phone registered to access UC Invest Online. Single use SMS codes are used to protect your security.

Full Access  Enquiry Only  Not Applicable

Telephone Transfer Service (TTS)

Transactions requested via the Telephone Transfer Service will only occur between this investment and your **Nominated Account** listed in **Section 3** of this application.

Full Access  Not Applicable

# Specimen Signature(s)

## Specimen Signatures and Signing Instructions

Name of Account Holder(s)

  

**OFFICE USE ONLY**

BSB    -

INVESTMENT NO.

### SIGNING INSTRUCTIONS

All Uniting Church investments require two authorised signatories to operate.

For all other investments please select either:  One signatory ONLY  Two signatories together

### SPECIMEN SIGNATURES

One signature per box using BLACK or BLUE ink.

<b>1</b>	SIGNATURE:	<input type="text"/>
	PRINT NAME	<input type="text"/>
<b>2</b>	SIGNATURE:	<input type="text"/>
	PRINT NAME	<input type="text"/>
<b>3</b>	SIGNATURE:	<input type="text"/>
	PRINT NAME	<input type="text"/>
<b>4</b>	SIGNATURE:	<input type="text"/>
	PRINT NAME	<input type="text"/>
<b>5</b>	SIGNATURE:	<input type="text"/>
	PRINT NAME	<input type="text"/>
<b>6</b>	SIGNATURE:	<input type="text"/>
	PRINT NAME	<input type="text"/>

Authority effective from:

/  /   /

## 6. Sign Here to Authorise Account Opening

Authority has been duly given by resolution passed at a legally constituted meeting of committee members of the Uniting Church organisation in accordance with the rules (where applicable) for the opening of the investment(s) in the name set out in this application. We are authorised to open the abovementioned investment(s) with UC Invest.

UC Invest respects the privacy of all individuals and is bound by and committed to supporting the Privacy Act and National Privacy Principles. A copy of our privacy policy is available at [www.ucinvest.com.au](http://www.ucinvest.com.au).

Authorised signatory - SIGN BELOW

Authorised signatory - SIGN BELOW

Name

\_\_\_\_\_

Position

\_\_\_\_\_

Date

      /       /            

Name

\_\_\_\_\_

Position

\_\_\_\_\_

Date

      /       /            

### UC Invest

An activity of the Uniting Church SA | The Uniting Church in Australia Property Trust (SA) | ABN: 25 068 897 781  
Level 2, 212 Pirie Street, Adelaide | GPO Box 2145, Adelaide SA 5001

Phone: 1300 274 151 | Fax: (08) 8236 4250 | Email: [info@ucinvest.com.au](mailto:info@ucinvest.com.au) | Web: [www.ucinvest.com.au](http://www.ucinvest.com.au)

### Notice to Investors / Prospective Investors

UC Invest is an activity of The Uniting Church in Australia Property Trust (SA) ABN 25 068 897 781, the legal entity of the Uniting Church SA. Financial services are provided on behalf of the Uniting Church SA pursuant to ASIC Regulatory Guide 87, ASIC Class Order 02/184 exemption, s.911A Corporations Act 2011 (Cth) authorisation and APRA Banking Exemption No. 1 of 2006 ("The Uniting Church in Australia Property Trust (SA)").

Neither UC Invest nor the Uniting Church SA are prudentially supervised by the Australian Prudential Regulation Authority (APRA). Investments and contributions lodged with UC Invest will not benefit from the depositor protection provisions of the Banking Act 1959 (Cth). Investments in UC Invest are designed for investors who wish to support the charitable purpose of the Uniting Church SA and for who the consideration of profit is not of primary relevance.

### OFFICE USE ONLY

DATE RECEIVED

ENTERED BY

BATCH