

Account Access / Change of Details Form

Individuals ONLY – RETAIL Clients



Please use this form to apply for access to UC Invest Online (UCIO) and the Telephone Transfer Service (TTS). There are also some personal and sensitive information changes that cannot be completed over the telephone.

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

Please return your completed form to our office

In person
Level 2, 212 Pirie Street
Adelaide

By mail
GPO Box 2145
Adelaide SA 5001

By email
info@ucinvest.com.au

Need help or have a question?

Call: 1300 274 151

Email: info@ucinvest.com.au

Visit: ucinvest.com.au

1. Your current details

Title _____ Given names _____

Surname _____ Date of birth _____ / _____ / _____

Address _____

Suburb _____ State _____ Postcode _____

Mobile _____

2. Access to UC Invest Online (UCIO)

Only applicants who are authorised signatories can have access to an investment via UC Invest Online.

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

Investment Number	Investment Holder(s) Name	Access Level
		<input type="checkbox"/> View only
		<input type="checkbox"/> View only
		<input type="checkbox"/> View only
		<input type="checkbox"/> View only

3. Telephone Transfer Service (TTS)

Only applicants who are authorised signatories can use the Telephone Transfer Service to request transactions. Transactions requested via the TTS will only occur between the investment(s) listed below and your **nominated account in Section 4** of this form.

The TTS uses a standing Direct Debit Request which authorises UC Invest to debit funds from your **Nominated Amount** to this investment. The terms and conditions for Direct Debit Requests and the TTS are contained in the UC Invest *Product Disclosure Statement* which is available on our website **ucinvest.com.au**.

Investment Number	Investment Holder(s) Name	Access
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes

4. Nominated Account

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

- 1. Send any interest payments **(If requested in Step 5)**
- 2. Debit or credit an amount that you request via the Telephone Transfer Service (TTS) **(If you are registered to use this service in section 3)**

The TTS uses a standing Direct Debit Request which authorises UC Invest to debit funds from your **Nominated Amount** to this investment. The terms and conditions for Direct Debit Requests and the TTS are contained in the UC Invest *Product Disclosure Statement* which is available on our website **ucinvest.com.au**.

Financial Institution _____

Account Holder _____

Must be held in the name of at least one account holder

BSB number _____

Must be 6 digits

Account number _____

Maximum 9 digits

5. Adjust your interest payment method

This option only applies to Fixed Term Investments.

Investment Number	Investment Holder(s) Name	Interest Payment Method
		<div><input type="checkbox"/> Add to this investment</div> <div><input type="checkbox"/> Pay interest to UC Invest Account _____</div> <div><input type="checkbox"/> Pay interest to the nominated account in section 4 above</div> <div><div><input type="radio"/> Every month</div><div><input type="radio"/> Every 3 months</div></div>

6. Adjust your signing instructions (joint investments only)

This signing instruction amendment will not alter or cancel any Telephone Transfer Service (TTS) authorities already in place.

Investment Number	Investment Holder(s) Name	Interest Payment Method	
		<input type="radio"/> One signature required	<input type="radio"/> Two signatures required
		<input type="radio"/> One signature required	<input type="radio"/> Two signatures required
		<input type="radio"/> One signature required	<input type="radio"/> Two signatures required
		<input type="radio"/> One signature required	<input type="radio"/> Two signatures required

7. Notification of change of name

If you have legally changed your name, please provide details of your new legal name and attach certified copies of supporting documentation which verifies the change.

New legal name

Previous signature

SIGN BELOW

New signature

SIGN BELOW

8. Change of contact details

Residential address

Address

Suburb State Postcode

Postal address *(if different to your residential address)*

Address

Suburb State Postcode

Contact details

Mobile Landline

Email

9. Sign here to authorise changes

I acknowledge that the access and information changes requested above are governed by the UC Invest terms and conditions contained in the *Product Disclosure Statement* and the *Financial Services Guide*. I have read and understood the information contained within these documents and agree to be bound by the conditions of these documents in relation to my requested changes.

By requesting access to the Telephone Transfer Service on this form, I request and authorise UC Invest (Debit User ID: 520962/332875) to debit the amount that I may request from time to time from the nominated account listed in **section 4** of this form.

Authorised Signatory - SIGN BELOW

Full name _____

Date ____ / ____ / ____

As an authorised signatory, I authorise the access and account information changes that have been requested in sections 2, 3, 4, 5 and 6 of this form.

Authorised Signatory / Joint investment holder - SIGN BELOW

Full name _____

Date ____ / ____ / ____

Disclaimer

Uniting Church SA Investment Fund Ltd ACN 620 095 472 AFSL 501022 ('the Fund') is a public company, limited by guarantee and registered under the *Corporations Act 2001 (Cth)*. The Fund exists for the charitable purpose of supporting the mission of the Uniting Church in Australia. The Fund holds an Australian Financial Services licence (AFSL) number 501022 authorising it to deal in, and provide general financial product advice in relation to, securities (which include debentures) and non-cash payment products. It also operates under an instrument made by ASIC the effect of which is to exempt it from the requirement to comply with Parts 6D.2 and 6D.3 of the *Corporations Act 2001* in relation to offers to issue debentures (ASIC Corporations (Charitable Investment Fundraising) Instrument 2016/813). Our Charitable Investment Fundraiser Identification Statement provides more information and explains how investment funds are used to support the charitable purposes of the Fund. Our AFS Licence does not authorise us to provide personal advice. Before acquiring any product or service of UC Invest you should read our Product Disclosure Statement (PDS) and consider the appropriateness of the product or service, having regard to your particular objectives, financial situation and needs.

Pursuant to the Australian Prudential Regulation Authority (APRA) Banking Exemption No.1 of 2021, the Fund is not prudentially supervised by APRA. Therefore, an investor in the Fund will not receive the benefit of the financial claims scheme or depositor protection provisions of the *Banking Act 1959 (Cth)*. Investments in the Fund are intended to be a means for investors to support the charitable purposes of the Fund. The Fund is required by law to advise investors that investments in it are only intended to attract investors whose primary purpose for making their investment is to support the charitable purposes of the Fund, that investors may be unable to get some or all of their money back when they expect or at all, that investments are not subject to the usual protections for investors under the *Corporations Act 2001* or regulation by the Australian Securities and Investments Commission, and that the investment is not comparable to investments with banks, finance companies or fund managers. Unless otherwise specified, the products and services listed are only available in Australia.

UC Invest

A trading name of Uniting Church SA Investment Fund
ABN: 46 620 095 472 | AFSL: 501022

Registered office

Level 2, 212 Pirie Street, Adelaide SA 5000
GPO Box 2145, Adelaide SA 5001

1300 274 151
info@ucinvest.com.au