

# Signatory Authorisation Form

Uniting Church Organisations ONLY

ucinvest

Please use BLOCK LETTERS in black or blue pen.

**Please return your completed form to our office**

**In person**  
Level 2, 212 Pirie Street  
Adelaide

**By mail**  
GPO Box 2145  
Adelaide SA 5001

**Please note that emailed copies of this document will not be accepted**

**Need help or have a question?**

**Call:** 1300 274 151

**Email:** [info@ucinvest.com.au](mailto:info@ucinvest.com.au)

**Visit:** [ucinvest.com.au](http://ucinvest.com.au)

## Instructions for this form

- Each signatory will need to complete their personal contact information **AND** enter a wet ink signature in **Step 2** of this form.
- Any signatory who has not previously been identified by UC Invest will need to –
  - Complete and sign an Identity Verification Form
  - Ensure the Authorised Certifier completes their contact information in Step 2 of the Identity Verification Form
  - Attach a certified copy of the identification presented to the Authorised Certifier
- A copy of the minutes noting the change of signatories will need to accompany these documents.
- ALL** documents will need to be returned to UC Invest by post to –  
UC Invest  
GPO Box 2145  
ADELAIDE SA 5001

## 1. Yours organisation's details

Full name of organisation \_\_\_\_\_

☐ For **ALL** Current Investments

Or

Specific Investment Number(s)

\_\_\_\_\_

## 2. Details of authorised signatories for this investment

Authorised signatories acknowledge having read, understood and accepted the terms and conditions of investments as outlined in our *Financial Services Guide* and *Product Disclosure Statement*.

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

### SIGNATORY 1 – PRIMARY CONTACT PERSON

You will receive all correspondence in relation to this investment, and we will contact you in the first instance if we need to discuss this account.

Title \_\_\_\_\_ Given names \_\_\_\_\_

Surname \_\_\_\_\_ Date of birth \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Mother's maiden name \_\_\_\_\_

#### Residential address

Address \_\_\_\_\_

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

*continued overleaf »*

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

Address

Suburb  State  Postcode

**Contact details**

Mobile  Landline

Email

**Statement delivery method**

☐ Online ☐ Post

**Account access options**

**UC Invest Online (UCIO)** ☐ Full access ☐ View only

*You must have a mobile phone registered to access UC Invest Online.  
Single use SMS codes are used to protect your security.  
A default daily withdrawal limit of \$5,000 per day.*

**Telephone Transfer Service (TTS)** ☐ Yes

*Transactions requested via the TTS will only occur between this investment  
and the **Nominated Account** in **Step 4** of this application.*

Authorised Signatory 1 – SIGN BELOW

Date  /  /

**SIGNATORY 2**

Title  Given names

Surname  Date of birth  /  /

Mother's maiden name

**Residential address**

Address

Suburb  State  Postcode

**Contact details**

Mobile  Landline

Email

**Account access options**

**UC Invest Online (UCIO)** ☐ Full access ☐ View only

*You must have a mobile phone registered to access UC Invest Online.  
Single use SMS codes are used to protect your security.  
A default daily withdrawal limit of \$5,000 per day.*

**Telephone Transfer Service (TTS)** ☐ Yes

*Transactions requested via the TTS will only occur between this investment  
and the **Nominated Account** in **Step 4** of this application.*

Authorised Signatory 2 – SIGN BELOW

Date  /  /

continued overleaf »

### SIGNATORY 3

Title  Given names

Surname  Date of birth  /  /

Mother's maiden name

#### Residential address

Address

Suburb  State  Postcode

#### Contact details

Mobile  Landline

Email

#### Account access options

UC Invest Online (UCIO) ☐ Full access ☐ View only

*You must have a mobile phone registered to access UC Invest Online.  
Single use SMS codes are used to protect your security.  
A default daily withdrawal limit of \$5,000 per day.*

Telephone Transfer Service (TTS) ☐ Yes

*Transactions requested via the TTS will only occur between this investment  
and the **Nominated Account** in **Step 4** of this application.*

Authorised Signatory 3 – SIGN BELOW

Date  /  /

### SIGNATORY 4

Title  Given names

Surname  Date of birth  /  /

Mother's maiden name

#### Residential address

Address

Suburb  State  Postcode

#### Contact details

Mobile  Landline

Email

#### Account access options

UC Invest Online (UCIO) ☐ Full access ☐ View only

*You must have a mobile phone registered to access UC Invest Online.  
Single use SMS codes are used to protect your security.  
A default daily withdrawal limit of \$5,000 per day.*

Telephone Transfer Service (TTS) ☐ Yes

*Transactions requested via the TTS will only occur between this investment  
and the **Nominated Account** in **Step 4** of this application.*

Authorised Signatory 4 – SIGN BELOW

Date  /  /

*continued overleaf »*

## SIGNATORY 5

Title  Given names

Surname  Date of birth  /  /

Mother's maiden name

### Residential address

Address

Suburb  State  Postcode

### Contact details

Mobile  Landline

Email

### Account access options

UC Invest Online (UCIO) ☐ Full access ☐ View only

*You must have a mobile phone registered to access UC Invest Online.  
Single use SMS codes are used to protect your security.  
A default daily withdrawal limit of \$5,000 per day.*

Telephone Transfer Service (TTS) ☐ Yes

*Transactions requested via the TTS will only occur between this investment  
and the **Nominated Account** in **Step 4** of this application.*

Authorised Signatory 5 - SIGN BELOW

Date  /  /

## SIGNATORY 6

Title  Given names

Surname  Date of birth  /  /

Mother's maiden name

### Residential address

Address

Suburb  State  Postcode

### Contact details

Mobile  Landline

Email

### Account access options

UC Invest Online (UCIO) ☐ Full access ☐ View only

*You must have a mobile phone registered to access UC Invest Online.  
Single use SMS codes are used to protect your security.  
A default daily withdrawal limit of \$5,000 per day.*

Telephone Transfer Service (TTS) ☐ Yes

*Transactions requested via the TTS will only occur between this investment  
and the **Nominated Account** in **Step 4** of this application.*

Authorised Signatory 6 - SIGN BELOW

Date  /  /

3. Your nominated account

A Nominated Account is your external account at another financial institution where we will debit or credit an amount that you request via the Telephone Transfer Service (TTS).

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

Branch

Account Holder

BSB number

-

Must be 6 digits

Account number

Maximum 9 digits

4. Authorisation to change authorised signatories

Authority has been duly given by resolution passed at legally constituted meeting of committee members of the organisation in accordance with the rules, where applicable, to change the authorised signatories operating on the investments detailed in this authority.

Authorised person - SIGN BELOW

Authorised person - SIGN BELOW

Full name

Full name

Date

/

/

Date

/

/

## Important Information

Privacy Notice: The Privacy Act allows UC Invest to disclose personal information about you when related to the primary purpose of providing our products and services to you and managing our business. Personal information may include details to identify you and verify your identity, such as your name, date of birth and current address. If you do not provide us with the personal information that we request, we may not be able to consider your application or provide other services.

In some circumstances, we will need to provide your details to other organisations within Australia. This may include external service providers to us, such as organisations which we use to verify your identity, payment systems operators, our lawyers and auditors; your representatives for example, lawyer, financial advisor or attorney, as authorised by you; or government and regulatory authorities if required.

We will not disclose your personal information to third parties overseas. You represent that if at any time you supply us with personal information about another person, you are authorised to do so; and you agree to inform that person as to who we are, how to contact us, and how to obtain our Privacy Policy, and that we will use and disclose their personal information for the purposes set out in this Notice and that they can gain access to that information by contacting us.

We take all reasonable steps to ensure that all your personal information held by us is protected from misuse, interference and loss, and from unauthorised access, disclosure or modification. Our Privacy Policy, which is available at [ucinvest.com.au](http://ucinvest.com.au), provides additional information about how we handle your personal information.

*Anti-Money Laundering and Counter-Terrorism Financing (AML/CTF) Act 2006 (Cth)*: By signing this application form you are providing your express consent to collect personal information from you as required by the *AML/CTF Act 2006* and that UC Invest may take steps to verify the personal information it has collected. You consent to the collection, use, handling, disclosure and verification of information, including the use of on-line verification, as required by law. Where UC Invest utilises on-line verification, it will only use the assessment provided by the Reporting Body for the purpose of verifying your identity in accordance with the *AML/CTF Act 2006*.

## 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](mailto:info@ucinvest.com.au)