

Scheduled Transfer Form

Recurring Transaction Agreement

ucinvest

By completing this form, you will be authorising UC Invest to process a recurring transaction for the amount, type and frequency as nominated by you.

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



New request



Amend an existing request

1. Investment details

Account Holder

Account number Amount \$

Process every

☐

Week

☐

Fortnight

☐

Month

☐

Quarter

Start date / /

2. Type of transaction

Invest Funds with UC Invest – Transfer from my/our:

☐

UC Invest Investment

Account number Account holder

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

OR

☐

Bank or Credit Union Account (Direct Debit Request)

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

Withdraw Funds from UC Invest – Transfer to my/our:

☐

UC Invest Investment

Account number Account holder

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

OR

☐

Bank or Credit Union Account (Direct Debit Request)

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

3. Scheduled Transaction Authority

Where I/We have requested a direct debit, I/We authorise UC Invest (Debit User ID: 520962/332875) to debit my/our account listed in **Step 2** for the amount and frequency nominated in **Step 1**.

The terms and conditions for Direct Debit Requests are contained in the *Product Disclosure Statement*, available on our website ucinvest.com.au.

I/We will ensure that on the day of each scheduled transaction, I/we will have sufficient funds in my/our account to enable the transaction to occur.

I/We acknowledge that this request is a standing agreement which will remain in force until UC Invest is officially notified of its suspension or cancellation.

Authorised Signatory

SIGN BELOW

Full name _____

Date ____ / ____ / ____

Authorised Signatory

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

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info@ucinvest.com.au