

Baptist Financial Services Australia Ltd

ABN 56 002 861 789 – AFSL 311062

RETURN THIS FORM TO: Baptist Financial Services Australia Ltd (“BFS” and “Baptist Financial Services”)

Ph 1300 650 542

Email clients@bfs.org.au

Web www.bfs.org.au

PO Box 122 Epping NSW 1710

A delegated body of Australian Baptist Ministries



Account Application – Existing Client (ONLY IF NO change of signatories) (Baptist and Other Churches and Organisations)

Account Name:

Client No.

How to invest

Please ensure that you have:

- o Read and understood our ‘Financial Services Guide’ and ‘Product and Services Information – Affiliate and Wholesale Clients’ which explain our products and services, our privacy policy, complaints handling process, details the terms and conditions, as well as the key features, benefits and risks of using our non-cash payment products and debenture products; and
- o Completed the relevant sections of this Application Form.

Please use BLOCK LETTERS and tick required choices

STEP 1. Account Selection - I/we wish to open the following account(s). *Please tick your choice(s)*

Term Investment Opening amount \$ _____

Number of months at . % per annum with interest payable:

Monthly 3 Monthly 6 Monthly Annually On Maturity

Savings Account Opening amount \$ _____

Notice of Withdrawal Account Opening amount \$ _____
(31 days notice required for withdrawals)

Online Savings Account Opening amount \$ _____

Development Fund Account Opening amount \$ _____

STEP 2. Funds Required to Open Account (Please tick as appropriate):

Cheque/s attached. Transfer from BFS Account No. _____

If you wish BFS to make the initial investment by electronic funds transfer, please complete the Direct Debit Request overleaf.

STEP 3. Interest Payment Details Please select one of the following: *(Note: Not applicable for Funeral Savings Account.)*

Add interest to this account (compound) or

Pay interest to Baptist Financial Services Account Number _____ or

Pay interest to another financial institution account. Details of the account are:

Account name			
Financial institution		Branch	
BSB number		Account number	

STEP 4. Account Operating Instructions – Signatories and authority for new account/s requested above to be identical to existing account/s in the same name.

STEP 5. Internet account access is required for this account. Yes No

STEP 6. Beneficial Owner Information (for all accounts except individuals)

As part of our obligations under the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006* (Cth) we are required to re-verify relevant information from time to time.

Where a Customer Identification and Verification Checklist has not been completed within the last 3 years of the date of this application you should complete the Customer Identification and Verification checklist applicable to your organisation as set out below. Otherwise you do not need to complete this step.

<i>Please tick type of entity</i>	<i>*Please complete the following Customer Identification and Verification documents applicable to entity selected:</i>
Sole Trader <input type="checkbox"/>	Customer Identification and Verification documents- INDIVIDUAL or SOLE TRADER
Partnership <input type="checkbox"/>	Customer Identification and Verification documents- PARTNERSHIPS
Incorporated Association <input type="checkbox"/>	Customer Identification and Verification documents- ASSOCIATIONS
Unincorporated Association <input type="checkbox"/>	Customer Identification and Verification documents- ASSOCIATIONS
Trust <input type="checkbox"/>	Customer Identification and Verification documents- TRUST
Domestic Company <input type="checkbox"/>	Customer Identification and Verification documents- DOMESTIC COMPANY

***Must be completed with certified copy/s of documentation specified (including all pages)**

STEP 7. Sign Here

I/We apply to open the above-mentioned account(s) with Baptist Financial Services and I/we declare having received, read, and accepted the terms and conditions as contained in our 'Product and Services Information Statement – Affiliated and Wholesale Clients' and 'Financial Services Guide'.

I/We apply for Baptist Financial Services to issue the above debentures and open the above-mentioned account(s) and I/we declare that:

- I/we are authorised to make this application;
- I/we understand that BFS is not bound to accept the application and may reject the application at its discretion;
- all the information in this application form is true and correct and I/we agree to notify BFS immediately if there is any change to such details;
- I/we have received, read and accept the terms and conditions as contained in our 'Product Information Statement – Affiliated and Wholesale Clients' and, 'Financial Services Guide';
- If we are joint applicants, I/we agree that instructions may be given to BFS by either one of us and either of us may operate the account and bind the other;
- I/we meet:
 - the definition of 'wholesale client' under the *Corporations Act 2001*, and/or
 - the definition of 'associate' under *ASIC Corporations (Charitable Investment Fundraising) Instrument 2016/813* and definition of 'affiliate' under *Banking exemption No 1 of 2016*;
- I/we understand that we have had the opportunity to receive financial product advice.

SIGN HERE	SIGN HERE
NAME	NAME
POSITION	POSITION
Date	Date

Office Use Only: Affiliate Application

Date received:

