

Apply for ANFIN Online form

IMPORTANT INFORMATION FOR INVESTORS – PLEASE READ

Anglican Financial Services (ANFIN) is owned and operated by The Corporation the Synod of the Diocese of Brisbane ("Anglican Church Southern Queensland"). Neither the Anglican Church Southern Queensland nor ANFIN is prudentially supervised by the Australian Prudential Regulation Authority ("APRA"). Contributions to ANFIN do not obtain the benefit of the depositor protection provisions of the *Banking Act 1959* (Cth). The normal protections that would apply under the *Corporations Act* do not apply. ANFIN's investment products have not been examined or approved by the Australian Securities and Investments Commission ("ASIC"). Investors should be aware that ANFIN is not subject to the normal requirement to have a disclosure document or Product Disclosure Statement and be registered or have a trust deed under the *Corporations Act*. ANFIN is designed for investors who wish to promote the charitable purposes of the Anglican Church Southern Queensland and for whom the considerations of profit are not of primary relevance in the investment decision. ANFIN recommends that you obtain your own financial advice before making an investment with ANFIN.

This form may be lodged by:

Post

GPO Box 421 Brisbane QLD 4001

Fax

(07) 3835 2299

Email

askus@anfin.com.au

Helpful hints for completing this application:

- Allow two business days for your request to be processed.
- If an Authority to Operate Signatory is new to the organisation you must complete an *Identification and Verification Reference form* and a *Change to Authority to Operate Signatories form* before you can sign this form.
- An Authority to Operate Signatory is an individual, nominated by an organisation and approved by existing Authority to Operate Signatories, who can authorise ANFIN to initiate transfers, make enquiries and make changes relating to the organisation's ANFIN investments.
- ANFIN offer three types of ANFIN online user access to your investments:
 1. 'Full' access – Transactions debiting your ANFIN investment can be created, viewed and changed but cannot be approved by the ANFIN user.
 2. 'Create only' access – Transactions debiting your ANFIN investments can be viewed, created and changed by the ANFIN Online user. Transactions debiting your ANFIN investments can not be approved and processed by the ANFIN Online user.
 3. 'Enquiry only' access – Transactions debiting your ANFIN investments can be viewed by the ANFIN Online user. Transactions debiting your ANFIN investments can not be changed, approved and processed by the ANFIN Online user. New transactions debiting your ANFIN investments can not be created by the ANFIN Online user.

Please use BLOCK LETTERS in BLACK OR BLUE PEN ONLY and tick required choices

STEP 1 – PLEASE TICK OPTION REQUIRED

- Establish ANFIN Online (complete steps 2 through to 8)
- Change in daily redemption limit (complete steps 2, 4, 7 & 8)
- Enable access to upload ABA files through ANFIN Online (Entities only) (complete steps 2, 5, 7 & 8)
- Add or remove investments to my ANFIN Online access (complete steps 2, 3, 7 & 8)

STEP 2 – DETAILS OF APPLICANT

Title	Given names	Surname		
Postal address		Suburb	State	Postcode
Email		Telephone		Mobile

Preferred method of contact regarding this form

- Telephone
 Post
 E-mail

STEP 3 – LIST OF INVESTMENTS AND LEVEL OF ANFIN ONLINE ACCESS

Your existing investments can be added or removed for your online access.

Action Options		Client Number	Investment Number	Online Access		
<input type="checkbox"/> Add	<input type="checkbox"/> Remove			<input type="checkbox"/> Full	<input type="checkbox"/> Create only	<input type="checkbox"/> Enquiry only
<input type="checkbox"/> Add	<input type="checkbox"/> Remove			<input type="checkbox"/> Full	<input type="checkbox"/> Create only	<input type="checkbox"/> Enquiry only
<input type="checkbox"/> Add	<input type="checkbox"/> Remove			<input type="checkbox"/> Full	<input type="checkbox"/> Create only	<input type="checkbox"/> Enquiry only
<input type="checkbox"/> Add	<input type="checkbox"/> Remove			<input type="checkbox"/> Full	<input type="checkbox"/> Create only	<input type="checkbox"/> Enquiry only
<input type="checkbox"/> Add	<input type="checkbox"/> Remove			<input type="checkbox"/> Full	<input type="checkbox"/> Create only	<input type="checkbox"/> Enquiry only
<input type="checkbox"/> Add	<input type="checkbox"/> Remove			<input type="checkbox"/> Full	<input type="checkbox"/> Create only	<input type="checkbox"/> Enquiry only
<input type="checkbox"/> Add	<input type="checkbox"/> Remove			<input type="checkbox"/> Full	<input type="checkbox"/> Create only	<input type="checkbox"/> Enquiry only

STEP 4 – CHANGES TO ANFIN ONLINE DAILY REDEMPTION LIMITS

Please tick the option required:

- Apply default redemption & transactional limits* to the above investments
- Increase redemption & transactional limits for the above investments

Specify new daily redemption limit amount (maximum \$200,000)

Specify new transactional limit amount (maximum \$50,000)

*Current default daily redemption limit is \$10,000 and transactional limit is \$5,000.

STEP 5 – ACCESS TO UPLOAD ABA FILES THROUGH ANFIN ONLINE

ANFIN Online offers a convenient and efficient method of adding your payment file created using your existing business accounting software. These payment/ABA files can easily be imported into ANFIN Online.

Please tick the option required:

- Enable access to upload ABA files
- Do not enable access to upload ABA files

STEP 6 – SECURITY QUESTION FOR ANFIN ONLINE ACCESS

What is your mother's maiden name?

What is the name of the first school you attended?

What is your date of birth?

STEP 7 – SIGNATURE

By signing this form, I acknowledge that I have been provided with, and have read and understood, the ANFIN Terms and Conditions. The Terms and Conditions may be viewed at any time by visiting www.anfin.com.au and clicking on 'Resources'.

Applicant's signature

Print full name

Date

Client number

STEP 8 – AUTHORISATION BY ORGANISATION ONLY

I/We the Authority to Operate Signatories authorise the Applicant to have access to the investments listed in step 4.

Authority to Operate Signatory 1

Authority to Operate Signatory 2

Print full name

Print full name

Date

Client number

Date

Client number

Important message to applicant – for ANFIN Online

When your application has been processed, ANFIN will write to you to advise you of your Login ID. When you receive this letter, please contact Anglican Financial Services (ANFIN) by telephone to request your PASSWORD.

Please note that only the Applicant may contact Anglican Financial Services (ANFIN) to request this password. Your security questions will be used to identify you.

For your security, do not, under any circumstances, reveal your password to another individual or organisation. It must remain confidential at all times. Anglican Financial Services (ANFIN) will never ask you to reveal your password.

Office Use Only – CSO to complete

- Verified Signatory 1 and Signatory 2
- Applicant's login ID
- Applicant's security questions entered as system note
- Changes to default limits processed
 - New transactional limit
 - New withdrawal limit
- Preferred method of contact added as a system note
- RIM to receive electronic statements
- Notification of business email address
- Original document stored in filing room
- Filed electronically

RIM.....
DATE
DOC TYPE: ANFIN ONLINE
.....
ACCOUNT
REFERENCE
.....
INITIAL

Processed by: Date:

Reviewed by: Date:

Office Use Only – BOM to complete

- Enabled ABA File Access for this client