

ANFIN Change of Details form

IMPORTANT INFORMATION FOR INVESTORS – PLEASE READ

Anglican Financial Services (ANFIN) is owned and operated by The Corporation of 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

Email

askus@anfin.com.au

Helpful hints for completing this application:

- This form must be completed for Authority to Operate Signatories when they are updating personal records.
- Facsimile copies are not acceptable.
- 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.

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

STEP 1 – PLEASE TICK THE OPTION REQUIRED

- Change of address (Complete steps 2, 3 and 7)
- Change of contact details (Complete steps 2, 6 and 7)
- Change of name (Complete steps 2, 4 and 7)
- Change of bank details (Complete step 2, 5 and 7)

STEP 2 – YOUR NAME

Title Given name(s) Surname

STEP 3 – ADDRESS DETAILS

Residential address

Number Street name

Suburb State Postcode

Postal address (if different from above)

Care of details Box type Box number

Suburb State Postcode

STEP 4 – YOUR NAME

You must provide certified copies of the following documentations in order for ANFIN to change your name:

1. Re-issued Birth Certificate
2. Marriage Certificate (if applicable)

Title Given name(s) Surname

STEP 5 – BANK DETAILS

Account name

BSB Number Branch Account number

Financial institution

STEP 6 – CONTACT DETAILS

Email address Telephone number

Business phone Fax Mobile number

STEP 7 – AUTHORISATION AND ACKNOWLEDGEMENT OF APPLICANT

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'.

I, the applicant, declare the details stated in this form are true and correct. In addition, I undertake to provide ANFIN with such additional information or documentation as ANFIN may request at any future time to ensure compliance with the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.

Applicant's signature

Print full name

Date Client number

Office Use Only

- Applicant identified and verified - RIM
- Proof of name change
- File Electronically
- Original document stored in filing room

Processed by: Date:

Reviewed by: Date:

RIM.....
DATE
DOC TYPE: ALTERATIONS
.....
ACCOUNT
REFERENCE
.....
INITIAL