

Change to Authority to Operate Signatories 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

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.
- Two current Authority to Operate Signatories must sign this form.
- **This form will replace all Authority to Operate Signatories on file.**

What is an Authority to Operate Signatory?

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 – YOUR DETAILS

Name of organisation

Client Number

These changes apply to all investment number(s) for our organisation.

OR

These changes apply to the below investment number(s) only.

Client number	Client name	Investment number

STEP 2 – LIST OF AUTHORITY TO OPERATE SIGNATORIES APPLYING TO ACCOUNTS ABOVE

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'.

It is important when changes are made that we verify the complete list of authority to operate signatories.

Note: Please include all Authority to Operate Signatories (ATO) including any existing ATO's who may be currently unavailable for signing. This list will replace the Authority to Operate Signatories currently on our files.

1. Full name		Position (if applicable)	Signature
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
2. Full name		Position (if applicable)	Signature
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
3. Full name		Position (if applicable)	Signature
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
4. Full name		Position (if applicable)	Signature
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form
5. Full name		Position (if applicable)	Signature
Has your identity been previously verified by ANFIN		<input type="checkbox"/> Yes	Client number
		<input type="checkbox"/> No	Please fill out Identification and Verification Reference form

STEP 3 – AUTHORISATION BY ORGANISATION

I/We the Authority to Operate Signatories authorise the Applicant to have access to the investments listed in step 1.

Authority to Operate Signatory 1

Authority to Operate Signatory 2

Print full name

Print full name

Date

Client number

Date

Client number

Office Use Only

- Verified Authority to Operate Signatory 1 and 2
- Amend list of ATO's in system
- If new client, complete verification process
- Filed

Processed by: Date:

Reviewed by: Date:

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