

# Investment 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:

- All requests received after 11am will not be processed until the next business day.
- Allow two business days for your request to be processed.
- If an Authority to Operate Signatory is new to the organisation they must complete an *Identification and Verification Reference form* and a *Change to Authority to Operate Signatories form* before they can sign this form.
- Two current Authority to Operate Signatories must 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.
- If you are a new ANFIN client you must complete an *Investment Application form* and an *Identification and Verification Reference form*.

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

### STEP 1 – PLEASE TICK OPTION REQUIRED

- Transfer money to an ANFIN investment (complete steps 2, 4 and 5)
- Invest a cheque to an ANFIN investment (complete steps 3, 4 and 5)

### STEP 2 – DETAILS OF FINANCIAL INSTITUTION ACCOUNT TO BE DEBITED

Please provide details of accounts for transfer of funds

Institution (Eg: ANFIN or WBC)	Account name	BSB number	Account number	Amount	Reference

### STEP 3 – DETAILS OF CHEQUE(S)

Please provide details of each cheque you wish to invest

Drawer	BSB number	Account number	Amount
Total			

#### STEP 4 – DETAILS OF ANFIN INVESTMENT TO BE CREDITED

Client number                          Investment number                          Investment name (in full)

#### STEP 5 – AUTHORISATION FOR INVESTMENT

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](http://www.anfin.com.au) and clicking on 'Resources'.

I/We the Authority to Operate Signatories of the investment, authorise the transaction contemplated by this form.

#### 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 owner of the account
- Verified Authority to Operate Signatory 1 and 2
- Instructions processed as per client request
- Cheque invested as requested
- Disbursement processed as requested
- Original document stored in filing room
- Filed electronically

Processed by:  Date:

Reviewed by:  Date:

RIM.....

DATE .....

DOC TYPE: DAILY PACKET.....

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ACCOUNT .....

REFERENCE .....

.....

INITIAL .....