

New account(s) and Access services



Member details

Personal account

Each account owner must be a share-holding member of Credit Union SA Ltd. The first named member (1) shall be deemed the primary owner and will appear first on the account details of joint accounts.

Member number (1) _____

Member number (2) _____

Full name _____

Full name _____

Contact phone number _____

Contact phone number _____

Email _____

Email _____

Non-personal account

Member number _____ Name of entity _____

Account selection

Conditions of use apply to these accounts. Details are available on request or will be provided at the time of your application. Please tick the accounts you require.

- Access Account
- Children's Savings Account
- Bonus Savings Account
- Educator+ Account
- Netsave Account
- 55+ Account
- Association Account

Access authority - for joint account or non-personal account

- Any to sign
- Any two to sign
- All to sign

If this is a joint account please indicate which account owners are to receive statements:

- Account owner (1)
- Account owner (2)
- Both

Tax file number or Exemption

Quoting your Tax File Number (TFN) or Exemption is not compulsory but failing to do so may result in Withholding Tax being deducted from interest earned. The quoted TFN or Exemption will be linked to all accounts under your membership.

Member (1) TFN or Exemption _____ Member (2) TFN or Exemption _____

Please ensure you sign the declaration overleaf

New access and service options

Access card - Card and PIN will be sent by separate mail.

- Visa debit card

Linking accounts to your card -

1st account _____
Full access EFTPOS, Bank@Post and all ATMs

2nd account _____
Access from Bank@Post

Loan account _____
Access for deposits at Bank@Post only

Visa posting account _____
Access for visa card purchases only

- Access code** - to access account(s) via the phone to the Member Contact Centre. Select any combination of 4 to 8 letters & numbers. **Do not** use dates of birth, phone numbers etc as it opens the possibility of fraud on your account.

Code _____

- Internet banking** - we will provide your initial password.

eStatements -

Email _____

which is my Home email Work email

Access card - Card and PIN will be sent by separate mail.

- Visa debit card

Linking accounts to your card -

1st account _____
Full access EFTPOS, Bank@Post and all ATMs

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- Access code** - to access account(s) via the phone to the Member Contact Centre. Select any combination of 4 to 8 letters & numbers. **Do not** use dates of birth, phone numbers etc as it opens the possibility of fraud on your account.

Code _____

- Internet banking** - we will provide your initial password.

eStatements -

Email _____

which is my Home email Work email

New access and service options continued...

Member (1)

- SMS Alerts - complete relevant sections below.
Mobile phone number: _____
 New Amendment Cancel alert Cancel service
- I require 'On Demand' SMS only
- Please set-up the following SMS 'Event Alerts'
 - Direct debit received Direct credit received
 - Account balance on -
Account No: _____
Low amount: \$ _____ and/or
High amount: \$ _____
 - Account balance on -
Account No: _____
Low amount: \$ _____ and/or
High amount: \$ _____
 - Scheduled balance on -
Account No: _____
Start date: _____
Time: _____ am / pm
 Daily Weekly
 Fortnightly Monthly
 - Scheduled balance on -
Account No: _____
Start date: _____
Time: _____ am / pm
 Daily Weekly
 Fortnightly Monthly

Member (2)

- SMS Alerts - complete relevant sections below.
Mobile phone number: _____
 New Amendment Cancel alert Cancel service
- I require 'On Demand' SMS only
- Please set-up the following SMS 'Event Alerts'
 - Direct debit received Direct credit received
 - Account balance on -
Account No: _____
Low amount: \$ _____ and/or
High amount: \$ _____
 - Account balance on -
Account No: _____
Low amount: \$ _____ and/or
High amount: \$ _____
 - Scheduled balance on -
Account No: _____
Start date: _____
Time: _____ am / pm
 Daily Weekly
 Fortnightly Monthly
 - Scheduled balance on -
Account No: _____
Start date: _____
Time: _____ am / pm
 Daily Weekly
 Fortnightly Monthly

Declaration

- I/we acknowledge that I have received the *Deposit Accounts and Access Services Terms and Conditions* for the account(s) and service(s) chosen and agree to abide by these terms and conditions.
- In reference to joint accounts, I authorise being a joint owner in the account(s) selected.
- In reference to non-personal accounts I/we confirm that I/we are authorised to open and operate this new account.

Signature (1) _____ Date _____

Name _____ Member No. _____

Signature (3) _____ Date _____

Name _____ Member No. _____

Signature (2) _____ Date _____

Name _____ Member No. _____

Signature (4) _____ Date _____

Name _____ Member No. _____

Office use only

Section 1 – to be completed by staff accepting application

- Signature verified Fees and charges schedule provided
- T&C's provided and logged Interest rate schedule provided

Taken by _____ Branch _____

Date _____

Account numbers opened: _____

Section 2 – to be completed by staff processing application

Confirmation SMS/letter - Internet banking Phone banking
 Access code

Card ordered (if applicable)

Processed by _____ Date _____