

# Account signatory application

## Authorisation from existing account owner(s)

Member number \_\_\_\_\_ Account owner(s) name \_\_\_\_\_

I/we authorise the person named in 'account signatory details' to transact on the following account(s);

Account number \_\_\_\_\_ Account number \_\_\_\_\_ Account number \_\_\_\_\_

### Declaration of account owner(s)

- I/we understand that the person authorised to act as signatory has full powers to access the account. This includes accessing the account via any service attached to the account. However, this excludes the authority to close the account.
- I/we acknowledge that the credit union is not liable for any losses from the account or any damage caused by the person hereby authorised to access the account.

### All account owner(s) must sign this authority -

Signature (1) \_\_\_\_\_ Date \_\_\_\_\_ Signature (2) \_\_\_\_\_ Date \_\_\_\_\_

## Account signatory details

Member number (if existing member) \_\_\_\_\_

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Mx Surname \_\_\_\_\_

First name \_\_\_\_\_ Middle name(s) \_\_\_\_\_

Other names commonly known by (not nicknames) \_\_\_\_\_ Date of birth \_\_\_\_\_

Home address \_\_\_\_\_

Postal address ☐ same as above \_\_\_\_\_

Home phone \_\_\_\_\_ Work phone \_\_\_\_\_ Mobile \_\_\_\_\_

Home email \_\_\_\_\_ Work email \_\_\_\_\_

Are you a permanent Australian resident? ☐ Yes ☐ No

### Access & Services Options - Please tick the required account access/service(s).

- ☐ **Access code** - Select any combination of 4 to 8 letters & numbers. **DO NOT** use dates of birth, phone numbers etc.  
Existing members: please note this access code will override any existing access code on your personal membership.

Code - \_\_\_\_\_

- ☐ **Internet banking** - If you do not already have the internet banking service we will provide your initial internet banking password.

- ☐ **Phone banking** - If you do not already have the phone banking service we will provide your initial phone banking password.

### ☐ Visa Debit Card

Linking accounts to your card

1st account \_\_\_\_\_ 2nd account \_\_\_\_\_ VISA posting account \_\_\_\_\_  
full access eftpos, bank@post and all atm's access from rediATMs & bank@post access for visa card purchases only

### ☐ Visa Credit Card

### Declaration of account signatory

- The details provided in this application are true and correct. I acknowledge that it is an offence under Anti- Money Laundering and Counter Terrorism Financing Act 2006(Cth) to give false and misleading information.
- I acknowledge that I have received the *Deposit Accounts and Access Services Terms and Conditions* and agree to abide by these terms and conditions.

'Account Signatory' signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**Office use only****SECTION 1 - to be completed by branch**

Account owner authorisation confirmed -

- ☐ Account owner attended branch and identity verified  
OR
- ☐ Confirmed authorisation with account owner by telephone (Access code quoted)  
OR
- ☐ Unable to contact account owner to confirm authorisation
- ☐ Member identification attached (if signatory is not a current member)
- ☐ CRM 'N' Number \_\_\_\_\_ loaded (if signatory is not a current member)
- ☐ Deposit Accounts and Access Services Terms and Conditions provided & logged on CRM

Taken by: \_\_\_\_\_ Date: \_\_\_\_\_

**SECTION 2 - to be completed by Member Administration upon receipt of this form**

- ☐ Authorisation confirmed with account owner (ie either by branch staff or membership officer)
- ☐ Account signatory membership opened (if signatory is not a current member) - Membership number \_\_\_\_\_
- ☐ Account signatory attached to relevant account
- ☐ Services loaded (if applicable)
- ☐ Self Service Teller and PayTo Service added (if signatory is not a current member)
- ☐ Signatory welcome letter sent (if signatory is not a current member)
- ☐ Confirmation letter issued (if applicable - relates to signatory(s) who are existing members)
  - ☐ Internet Banking
  - ☐ Phone Banking
  - ☐ Access Code
- ☐ Card ordered for account signatory (if applicable)

Completed by: \_\_\_\_\_ Date: \_\_\_\_\_