

Application for Joint & Partnership Accounts

Please note: You will need to complete an 'Application for Individual Membership' (if not already done so) for each individual joint account applicant, in conjunction with the completion of this form.

Please complete the following in block letters:

SECTION A:	MEMBER NUMBER:	(OFFICE USE ONLY)
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PLEASE OPEN A JOINT ACCOUNT IN THE FOLLOWING NAMES:

1ST PERSON (Primary)

TITLE: (Please tick)	<input type="checkbox"/> MR	<input type="checkbox"/> MRS	<input type="checkbox"/> MISS	<input type="checkbox"/> MS
MEMBER NUMBER:				
SURNAME:				
GIVEN NAMES:				
CONTACT:	MOBILE:	HOME:	WORK:	

2ND PERSON

TITLE: (Please tick)	<input type="checkbox"/> MR	<input type="checkbox"/> MRS	<input type="checkbox"/> MISS	<input type="checkbox"/> MS
MEMBER NUMBER:				
SURNAME:				
GIVEN NAMES:				
CONTACT:	MOBILE:	HOME:	WORK:	

3RD PERSON

TITLE: (Please tick)	<input type="checkbox"/> MR	<input type="checkbox"/> MRS	<input type="checkbox"/> MISS	<input type="checkbox"/> MS
MEMBER NUMBER:				
SURNAME:				
GIVEN NAMES:				
CONTACT:	MOBILE:	HOME:	WORK:	

4TH PERSON

TITLE: (Please tick)	<input type="checkbox"/> MR	<input type="checkbox"/> MRS	<input type="checkbox"/> MISS	<input type="checkbox"/> MS
MEMBER NUMBER:				
SURNAME:				
GIVEN NAMES:				
CONTACT:	MOBILE:	HOME:	WORK:	

JOINT ACCOUNT METHOD OF OPERATION:

- ANY ONE TO SIGN ALL PARTIES TO SIGN OTHER

SECTION B: ACCOUNTS

An Access Account (S5) is automatically opened for you when you join. Please tick below if you wish to open an additional access or savings account.

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> ACCESS ACCOUNT | <input type="checkbox"/> ONLINE SAVINGS ACCOUNT | <input type="checkbox"/> INVESTMENT ACCOUNT |
| <input type="checkbox"/> GOLD RETIREMENT ACCOUNT | <input type="checkbox"/> CHRISTMAS CLUB ACCOUNT | <input type="checkbox"/> OTHER
PLEASE CONTACT ME TO DISCUSS MY OPTIONS. |

SECTION C: ACCESS

- VISA DEBIT CARD INTERNET BANKING & BANKING APP
- OTHER PLEASE CONTACT ME TO DISCUSS MY OPTIONS.

IMPORTANT INFORMATION

Statements

Consent for electronic delivery of statements and notices

Please use my email address

- To send me statements and notices for all my banking and loan accounts; or
- To tell me that they are available to view or download from your Internet Banking site.

I understand that:

- You will stop posting me paper statements and notices;
- I need to check my emails regularly;
- I can revert to receiving paper statements and notices in the post at any time;
- I will need to update my email address with the Credit Union if it changes; and
- If emails are undeliverable then I will receive paper statements.

- Tick here **IF BOTH/ ALL** persons to receive statements to this account, otherwise statements will only be forwarded to the 1st person.

When opening a Partnership Joint Account, the signatories confirm that the name of the partnership is listed in Section D.

1st PERSON	SIGNATURE:		DATE:	
2nd PERSON	SIGNATURE:		DATE:	
3RD PERSON	SIGNATURE:		DATE:	
4th PERSON	SIGNATURE:		DATE:	

SECTION D: PARTNERSHIP DETAILS (IF APPLICABLE)

PLEASE STATE PARTNERSHIP NAME OR REGISTERED BUSINESS NAME BELOW:

ABN:			
MAILING ADDRESS:			
EMAIL ADDRESS:			

TAX RESIDENCY OF PARTNERS

PARTNER	TAX RESIDENT OF AUSTRALIA ONLY (Tick if applicable)	OR	TAX RESIDENT OF EACH OF THE FOLLOWING COUNTRIES AND NOT A TAX RESIDENT OF ANY OTHER FOREIGN COUNTRY	
			COUNTRY	TAXPAYER IDENTIFICATION NUMBER (TIN)
1.	<input type="checkbox"/>			
2.	<input type="checkbox"/>			
3.	<input type="checkbox"/>			
4.	<input type="checkbox"/>			

*The TIN is the taxpayer identification number used in the relevant country. If the partner does not have a TIN for a country he or she is a tax resident of please explain why, being either (A) the country does not issue TINs to residents or (B) other reason why the partner does not have a TIN (with explanation).

PARTNER	COUNTRY	REASON (A) or (B)	EXPLANATION FOR (B)
1.			
2.			
3.			
4.			

PARTNERSHIP TAX RESIDENCY

We certify that (please select one answer only):

The Partnership's place of effective management is in Australia.
(If skip the following)

OR

The Partnership's place of effective management is in the following foreign country:
(If please complete the following)

COUNTRY	TAX IDENTIFICATION NUMBER (TIN)*

*The TIN is the taxpayer identification number used in the relevant country. If the Partnership does not have a TIN for the country its place of effective management is in please explain why, being either (A) the country does not issue TINs to residents or (B) other reason why the Partnership does not have a TIN (with explanation).

REASON (A) or (B)	EXPLANATION FOR (B)

OFFICE USE ONLY

<input type="checkbox"/> CONDITIONS OF USE	<input type="checkbox"/> SHARES ISSUED	<input type="checkbox"/> TFN/ ABN LOADED AND DESTROYED
<input type="checkbox"/> FINANCIAL SERVICES GUIDE	<input type="checkbox"/> VISA CARD/S ORDERED	<input type="checkbox"/> BUSINESS NAME REGISTRATION CERTIFICATE DETAILS CONFIRMED & MATCHED TO ASIC SEARCH
<input type="checkbox"/> PRIVACY STATEMENT	<input type="checkbox"/> INTERNET ACCESS CODE ALLOCATED	
<input type="checkbox"/> SUMMARY OF ACCOUNTS	<input type="checkbox"/> E-STATEMENTS SET UP	<input type="checkbox"/> CUSTOMER IDENTIFICATION PROCEDURE PARTNERSHIP COMPLETED
<input type="checkbox"/> FEES & CHARGES SCHEDULE	<input type="checkbox"/> SIGNATURE CARD SIGNED	