

- Once complete please email this form and supporting documents to csg@melbcdf.org.au
- A user guide and identification documents are available on our [website](#)

Section 1 Account Holder Details

Account Holder Name*	Client Number*
Address*	
Contact Number*	

Section 2 Contact details

Name*	Role*
Contact Number*	Email*

Section 3 Manage Account Access

Important:

- Please enter personal details exactly as shown on identification documents
- Do not enter nicknames, aliases or shortened names
- Fields containing * are mandatory

Add Authorised Person 1

First Name*	Middle Name(s)	Last Name*
Date of Birth (dd/mm/yyyy)* Residential Address*		
Contact Number*	Email*	

Access Type*

Account Signatory with CDF Online Access	CDF Online Access Only
Access Level ☐ Transact – authorised to initiate transactions but cannot make changes to accounts ☐ Transact & Amend – authorised to initiate and authorise transaction and make changes to accounts CDF Online Transaction Limit \$	Access Level ☐ Data Entry – authorised to initiate CDF Online transactions, view transaction history and account balances ☐ View Only – authorised to view transaction history and account balances

Account Access*

Nominate the accounts Person 1 can access

☐ All Accounts	
☐ Specific Accounts – enter account details	

Identification

Has Person 1 provided identification to CDF in the past 24 months?*

- ☐ Yes – no identification required
- ☐ No – please complete a [Certificate of Identity](#) and [NAB Specimen Signature Card](#) and return with this form. Once submitted, CDF will send this person an SMS with a unique link to complete electronic verification of identity.

Add Authorised Person 2

First Name*	Middle Name(s)	Last Name*
Date of Birth (dd/mm/yyyy)* Residential Address*		
Contact Number*	Email*	

Access Type*

Account Signatory with CDF Online Access Access Level ☐ Transact – authorised to initiate transactions but cannot make changes to accounts ☐ Transact & Amend – authorised to initiate and authorise transaction and make changes to accounts CDF Online Transaction Limit \$	CDF Online Access Only Access Level ☐ Data Entry – authorised to initiate CDF Online transactions, view transaction history and account balances ☐ View Only – authorised to view transaction history and account balances
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Account Access*

Nominate the accounts Person 2 can access

☐ All Accounts

☐ Specific Accounts – enter account details

Identification

Has Person 2 provided identification to CDF in the past 24 months?*

☐ Yes – no identification required

☐ No – please complete a [Certificate of Identity](#) and [NAB Specimen Signature Card](#) and return with this form. Once submitted, CDF will send this person an SMS with a unique link to complete electronic verification of identity.

Delete Existing Access

Complete this section to delete account and CDF Online access

Name	Access Type
	☐ Signatory ☐ CDF Online User
	☐ Signatory ☐ CDF Online User
	☐ Signatory ☐ CDF Online User
	☐ Signatory ☐ CDF Online User

Section 4 Authorisation

Terms and Conditions

- [Privacy Policy](#)
- [CDF Online Terms and Conditions](#)
- [Electronic Verification of Identification Statement](#)

By signing this form, I/we declare and confirm:

- I/we have authority to sign and approve this request of the account holder in accordance with any governing documents such as a charter of accounts or delegation of authority
- I/we have reviewed the following Terms and Conditions of acceptance and agree to them on behalf of the account holder
- I/we confirm that all Authorised Person(s) listed in this request are authorised to act on behalf of the account holder.

Signatory 1

Full Name

Role

Signature

Date signed (dd/mm/yyyy)

Signatory 2

Full Name

Role

Signature

Date signed (dd/mm/yyyy)

Disclosure Statement

The Fund is required by law to make the following disclosure. Investment in the Fund is only intended to attract investors whose primary purpose for making their investment is to support the charitable purposes of the Fund. Investors' funds will be used to generate a return to the Fund that will be applied to further the charitable works of the Archdiocese of Melbourne and the Dioceses of Sale, Bunbury and Ballarat. The Fund is not prudentially supervised by the Australian Prudential Regulation Authority nor has it been examined or approved by the Australian Securities and Investments Commission (ASIC). An investor in the Fund will not receive the benefit of the financial claims scheme or the depositor protection provisions in the Banking Act 1959 (Cth). The investments that the Fund offers are not subject to the usual protections for investors under the Corporations Act (Cth) or regulation by ASIC. Investors may be unable to get some or all of their money back when the investor expects or at all and investments in the Fund are not comparable to investments with banks, finance companies or fund managers. The Fund's identification statement may be viewed [here](#) or by contacting the Fund. The Fund does not hold an Australian Financial Services Licence.