

Please use this form to add Authorised Representatives to CDF estate accounts, including:

- Next of Kin, Executor or Administrator of a Deceased Estate
- Legal representative of an Executor or Administrator

Once complete, please email the signed form and supporting documents to csg@melbcdf.org.au.

Section 1 Estate Details

Full Name of the Deceased Account Holder

Estate of the Late

Member Number

Address

Section 2 Account Details

Add to all accounts

Add to the following accounts

CDF online access

Create CDF Online access to view accounts held in the name of the deceased

Section 3 Authorised Representative Details

First Name

Middle Name (if any)

Last Name

Date of Birth (dd/mm/yyyy)

Contact Number

Email

Address

Relationship to the Account Holder

Next of Kin

Executor or Administrator of a Deceased Estate

Legal representative of an Executor or Administrator, including Solicitors and Public Trustee

Section 4 Supporting Documents Checklist

Next of Kin

Certified copy of the Deceased's Will **or**

Certified copy of the Death Certificate naming the Next of Kin

Executor

Certified copy of the Deceased's Will **and**

Certified copy of a Grant of Probate

Administrator

Certified copy of Letters of Administration

Legal representative or Public Trustee

Certified copy of a Letter of Representation signed by the Executor or Administrator being represented

For Legal representatives only:

Firm Name

ABN

Reference Number (if required)

Section 5 Authorised Representative Signature

I confirm that the information I have provided is true and correct and that I am authorised to act in the capacity of an authorised representative.

Full Name

Signature

Date Signed (dd/mm/yyyy)

Important Information

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. Investor's funds will be used to generate a return to the Fund that will be applied to further the charitable works of the Catholic Church. 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. The Fund has entered into an intermediary authorisation with CDFCF AFSL Limited ABN 49 622 976 747, AFSL No. 504202 to issue and deal in debentures.

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