

Use this form to manage account access for CDF Online. Once complete, email the form to csg@melbcbdf.org.au

Important Information

- This form cannot be used to add or remove account signatories - click [here](#) to access our account amendment form
- Access Levels:
 - View Only – users can view account transaction history, including current balances. Users cannot submit or authorise transactions, nor enquire or make changes to accounts or CDF Online settings.
 - Data Entry – users can submit transactions and view account transaction history, including current balances. Users cannot authorise transactions, make changes to accounts or CDF Online settings.
- Access to all accounts provides access to all active CDF Cheque, Savings, Term Investment and Loan accounts.
- CDF requires all CDF Online users to be identified before access can be provided – our Client Services Group will contact each new user with instructions on how to complete the identification process.

Section 1 Account Holder Details

Account Holder Name

CDF Client Number

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Address

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Section 2 Contact details

Please provide the contact details for the person submitting this request. The contact person must be authorised to make this request on behalf of the Account Holder.

Name

Contact Number

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Email

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Section 3 Add Users**Add User 1**

First Name

Middle Name

Last Name

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Date of Birth (dd/mm/yyyy) Residential Address

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Contact Number

Email

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Access Level☐

View only

☐

Data Entry

Provide access to☐

All Accounts

☐

Specific Accounts:

Provide Account Details

--

Add User 2

First Name

Middle Name

Last Name

--	--	--

Date of Birth (dd/mm/yyyy) Residential Address

--	--

Contact Number

Email

--	--

Access Level☐

View only

☐

Data Entry

Provide access to☐

All Accounts

☐

Specific Accounts:

Provide Account Details

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Section 4 Remove Users

Remove User 1

Full Name	CDF Online Log In (if known)
<input type="text"/>	<input type="text"/>

Remove from ☐ All Accounts ☐ Specific Accounts:
Provide Account Details

Remove User 2

Full Name	CDF Online Log In (if known)
<input type="text"/>	<input type="text"/>

Remove from ☐ All Accounts ☐ Specific Accounts:
Provide Account Details

Section 5 Account Holder Authority

This form must be signed by authorised signatories in line with the account authority held by CDF for your accounts. By signing this form on behalf of the Account Holder named in Section 1 of the form, I/we accept the following:

- I/we have the authority to make this request on behalf of the Account Holder listed in Section 1 of this form
- All users accept and will comply with CDF Online Terms and Conditions – available [here](#) or on the CDF website
- All CDF Online users must be fully identified by CDF prior to being provided access to CDF Online.

Authorised Signatory 1

Full Name	Role	Date (dd/mm/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Signature

Authorised Signatory 2

Full Name	Role	Date (dd/mm/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Signature

Important Information

Disclosure Statement: View the CDF Disclosure Statement on the CDF website www.catholicdevelopmentfund.org.au

Privacy Policy: View the CDF Privacy Policy on the CDF website www.catholicdevelopmentfund.org.au/privacy

CDF Online Terms and Conditions: View the CDF Online Terms and Conditions on the CDF website www.catholicdevelopmentfund.org.au/communityfund/cdf-online-terms-and-conditions

Electronic Verification of Identity Statement: View the Electronic Verification of Identity Statement on the CDF website www.catholicdevelopmentfund.org.au/electronicverificationofidentitystatement