

Use this form to manage account access for CDF Online. Once complete, email the form to csg@melbcdf.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
<input type="text"/>	<input type="text"/>
Address	
<input type="text"/>	

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
<input type="text"/>	<input type="text"/>
Email	
<input type="text"/>	

Section 3 Add Users

Add User 1

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth (dd/mm/yyyy)	Residential Address	
<input type="text"/>	<input type="text"/>	
Contact Number	Email	
<input type="text"/>	<input type="text"/>	
Access Level	<input type="checkbox"/> View only	<input type="checkbox"/> Data Entry
Provide access to	<input type="checkbox"/> All Accounts	<input type="checkbox"/> Specific Accounts:
	Provide Account Details <input type="text"/>	

Add User 2

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth (dd/mm/yyyy)	Residential Address	
<input type="text"/>	<input type="text"/>	
Contact Number	Email	
<input type="text"/>	<input type="text"/>	
Access Level	<input type="checkbox"/> View only	<input type="checkbox"/> Data Entry
Provide access to	<input type="checkbox"/> All Accounts	<input type="checkbox"/> Specific Accounts:
	Provide Account Details <input type="text"/>	

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: 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.

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