

# Deceased Estate – Survivorship Transfer & Indemnity Form

Please use this form to transfer ownership of all accounts jointly held with a deceased account holder to the surviving account holder. Once complete, please email the signed form and supporting documents to [csg@melbcdcf.org.au](mailto:csg@melbcdcf.org.au).

## Section 1 Account Holder Details

### Deceased Account Holder

Full Name

Member Number

### Surviving Account Holder

**Important information** – please enter your full legal name, exactly as shown on government ID documents.

First Name

Middle Name (if any)

Last Name

Date of Birth (dd/mm/yyyy) Member Number

Address

Email

Contact Number

## Section 2 Declaration and Indemnity

This section must be physically signed by the surviving account holder for the instructions to be executed.

I, the surviving account holder as referred to in Section 1 of this form:

- Indemnify and will continue to indemnify CDF Community Fund (hereafter referred to as CDF) from and against any loss (including but not limited to any direct or indirect) damage, loss or cost (including legal costs) it may suffer because it makes the requested transfer and/or payment of funds held in the name of the deceased.
- Will pay and discharge all just debts that may be proved in the estate of the deceased.
- Will protect CDF from any claim or proceedings against CDF in relation to the credit balance of all accounts and investments related to this request.

By signing this request, I/we acknowledge and agree that:

- a. CDF will close all accounts jointly held between myself and the deceased referenced in Section 1 of this form and transfer the funds to my sole ownership.
- b. CDF will provide a closing account statement for each account within 30 days of closure.
- c. New accounts, including Term Investments, will be established in my name only, and will match the conditions of the closed accounts, including account type, investment term and interest rate applicable when the joint accounts were established or most recently reinvested, and I agree to the terms and conditions as outlined in the CDF information statement for the relevant account types.
- d. CDF may use and disclose my information for its internal administration and operations.
- e. CDF may disclose my information to other parties authorised and/or required by law to collect information related to this request and facilities held by the deceased.

### Surviving Account Holder

Full Name

Signature

Date Signed (dd/mm/yyyy)

### Important Information

**Disclosure Statement:** CDPF Limited, a company established by the Australian Catholic Bishops Conference, has indemnified the CDF Community Fund ABN 94 380 397 118 (the Fund) against any liability arising out of a claim by investors in the Fund. In practice, this means your investment is backed by the assets of Catholic Archdiocese of Melbourne. 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 intermediary authorisation with CDFCF AFSL Limited ABN 49 622 976 747, AFSL No. 504202 to issue and deal in debentures.

**Privacy Policy:** View the CDF Privacy Policy on the CDF website [catholicdevelopmentfund.org.au/privacy](https://catholicdevelopmentfund.org.au/privacy).

**Information Statement:** View the information statement on the CDF website [www.catholicdevelopmentfund.org.au/resources](https://www.catholicdevelopmentfund.org.au/resources).