

Use this form to apply for a new Term Investment account with CDF Community Fund. Once complete, email the signed form and supporting documents to csg@melbcbdf.org.au.

Section 1 Account Holder Details

Important Information: Enter the full name of your Entity – for Trusts and SMSF include both Trustee and Trust Names

Entity Name

Member Number (existing customers only)

ABN

Registered Business Address

Postal Address

For Trusts & SMSF Only

☐ Individual or Joint ☐ Corporate ACN

Section 2 Related Individuals

Important Information: Enter your full legal name exactly as shown on Government ID documents

Full Name

Member Number (existing customers only) Date of Birth (dd/mm/yyyy)

Address

Email

Phone Number

Role: ☐ Individual Trustee ☐ Director ☐ Beneficiary ☐ Member

☐ Select to opt in for CDF Online access, where you can securely view and manage your account online.

Full Name

Member Number (existing customers only) Date of Birth (dd/mm/yyyy)

Address

Email

Phone Number

Role: ☐ Individual Trustee ☐ Director ☐ Beneficiary ☐ Member

☐ Select to opt in for CDF Online access, where you can securely view and manage your account online.

Full Name

Member Number (existing customers only) Date of Birth (dd/mm/yyyy)

Address

Email

Phone Number

Role: ☐ Individual Trustee ☐ Director ☐ Beneficiary ☐ Member
☐ Select to opt in for CDF Online access, where you can securely view and manage your account online.

Full Name

Member Number (existing customers only) Date of Birth (dd/mm/yyyy)

Address

Email

Phone Number

Role: ☐ Individual Trustee ☐ Director ☐ Beneficiary ☐ Member
☐ Select to opt in for CDF Online access, where you can securely view and manage your account online.
Number of signatures required to operate this account: ☐ Any One ☐ Any Two ☐ All

Section 3 Term Investment Details

Date	Amount	Term	Interest Rate
	\$	months	% per annum. Current rates available here .

Section 4 Nominated Account Details

Please provide details of an account CDF can direct debit or direct credit funds related to your CDF Term Investment.

- The account must be held in the name of the entity referenced in Section 1.
- The account must be able to accept direct credits and direct debits.
- Non-CDF accounts must be held with an Australian authorised deposit-taking institution (ADI).
- When adding additional funds to your investment, funds must be available for direct debit at the time of maturity. If CDF is unable to process your request due to insufficient or unavailable funds, we will contact you to take additional instructions.

☐ CDF Account

Acc name

Acc number

☐ External Account

Name of Financial Institution

Acc name

BSB Acc number

If details of this account have not previously been provided to CDF, please enclose a Bank Statement header, which confirms the Account Name, BSB/Account Number and the name of the ADI.

Section 5 Supporting Documentation Checklist (Trusts and SMSF)

If this is the first time opening a Term Investment for the entity referenced in Section 1, please provide full certified copies of the following documents:

- ☐ **Trust Deed - mandatory**
- ☐ Deed of Variation /Amendment (if applicable)
- ☐ Change of Trustee Deed (if applicable)

Section 6 Member(s) Acknowledgment

Important Information: This section must be signed by all account holders listed in Section 2 of this form.

By signing this document, I/we acknowledge and accept:

- a. To withdraw funds prior to maturity, a 31-day notice of withdrawal period will apply, and the entire investment will earn interest at the 31-Day Mission Saver rate that was in effect on the date this Term Investment was opened.
- b. We have read the CDF Term Investment Information Statement and agree to abide by the terms and conditions outlined in the statement. View the Term Investment Information Statement at www.catholicdevelopmentfund.org.au/communityfund/term-investment-information-statement.
- c. **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 an intermediary authorisation with CDFCF AFSL Limited ABN 49 622 976 747, AFSL No. 504202 to issue and deal in debentures.
- d. **Direct Debit Request Service Agreement:** By signing this authority you acknowledge having read and understood the terms and conditions governing the debit arrangements between you and the CDF Community Fund as set out in this Term Investment Maturity Advice – you can view the CDF Direct Debit Request Service Agreement on the CDF website www.catholicdevelopmentfund.org.au/communityfund/direct-debit-service-agreement.
- e. **Privacy Policy:** View the Privacy Policy on the CDF website www.catholicdevelopmentfund.org.au/privacy

Signatory 1

Full Name	Signature
Date (dd/mm/yyyy)	

Signatory 2

Full Name	Signature
Date (dd/mm/yyyy)	

Signatory 3

Full Name	Signature
Date (dd/mm/yyyy)	

Signatory 4

Full Name	Signature
Date (dd/mm/yyyy)	