

# Account Access / Change of Details

Please complete one form per applicant

**Please return this form to:** UC Invest, GPO Box 2145, Adelaide SA 5001

Please use this form to apply for access to UC Invest Online (UCIO) and the Telephone Transfer Service (TTS). There are also some personal and sensitive information changes that cannot be completed over the telephone.

**If you are completing a printed copy of this form, please print in BLOCK LETTERS using BLACK or BLUE ink.**

## 1. Details of Applicant / Account Holder

Title \_\_\_\_\_ Given Names \_\_\_\_\_

Surname \_\_\_\_\_

Address \_\_\_\_\_

Suburb \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Phone \_\_\_\_\_

## 2. Access to UC Invest Online (UCIO)

Only applicants who are authorised signatories can have full access to an investment/loan via UC Invest Online. A default daily withdrawal limit of \$5,000 per account applies for transfers to accounts with external financial institutions.

**You MUST have a mobile phone registered with UC Invest to access UCIO. Single use SMS codes are used to protect your security.**

Investment/ Loan Number	Account Holder(s) Name	Daily Withdrawal Limit	Access Level
			<input type="checkbox"/> Full Access <input type="checkbox"/> Enquiry Only
			<input type="checkbox"/> Full Access <input type="checkbox"/> Enquiry Only
			<input type="checkbox"/> Full Access <input type="checkbox"/> Enquiry Only
			<input type="checkbox"/> Full Access <input type="checkbox"/> Enquiry Only
			<input type="checkbox"/> Full Access <input type="checkbox"/> Enquiry Only
			<input type="checkbox"/> Full Access <input type="checkbox"/> Enquiry Only

## 3. Access to the Telephone Transfer Service (TTS)

Only applicants who are authorised signatories can use the Telephone Transfer Service to request transactions. A default daily limit of \$5,000 per account applies for transfers to accounts with external financial institutions. Transactions requested via the TTS will only occur between the account(s) listed below and your **Nominated Account** in Section 4 of this form.

**The TTS uses a standing Direct Debit Request which authorises UC Invest to debit funds from your Nominated Account to this investment. The Terms and Conditions for Direct Debit Requests and the TTS are contained in the UC Invest Electronic & General Access Guide which is available on our website [ucinvest.com.au](http://ucinvest.com.au).**

Investment/ Loan Number	Account Holder(s) Name	Daily Withdrawal Limit	Access Level
			<input type="checkbox"/> Full Access
			<input type="checkbox"/> Full Access
			<input type="checkbox"/> Full Access
			<input type="checkbox"/> Full Access
			<input type="checkbox"/> Full Access
			<input type="checkbox"/> Full Access

## 4. Nominated Account

A **Nominated Account** is your external account at another financial institution where we will:

1. Send interest payments from your fixed term investment (if requested in Section 5 below)
2. Debit or credit an amount that you request via the Telephone Transfer Service (if you are registered to use this service)

The TTS uses a standing Direct Debit Request which authorises UC Invest to debit funds from your Nominated Account to this investment. The Terms and Conditions for Direct Debit Requests and the TTS are contained in the UC Invest Electronic & General Access Guide which is available on our website [ucinvest.com.au](http://ucinvest.com.au).

Financial Institution

Branch

\_\_\_\_\_

\_\_\_\_\_

Account Holder(s)

\_\_\_\_\_

BSB Must be 6 digits

Account Number Maximum 9 digits

\_\_\_\_\_ - \_\_\_\_\_

\_\_\_\_\_ \_\_\_\_\_ \_\_\_\_\_

## 5. Adjust your interest/distribution payment method

This option only applies to Fixed Term, UC Invest Share Fund and UC Invest Property Fund investments.

Investment Number	Account Holder(s) Name	Interest Payment Method
		<input type="checkbox"/> Add to this investment <input type="checkbox"/> Pay interest to UC Invest Account: _____ <input type="checkbox"/> Pay interest to the <b>Nominated Account</b> in section 4 above
		<input type="checkbox"/> Add to this investment <input type="checkbox"/> Pay interest to UC Invest Account: _____ <input type="checkbox"/> Pay interest to the <b>Nominated Account</b> in section 4 above
		<input type="checkbox"/> Add to this investment <input type="checkbox"/> Pay interest to UC Invest Account: _____ <input type="checkbox"/> Pay interest to the <b>Nominated Account</b> in section 4 above
		<input type="checkbox"/> Add to this investment <input type="checkbox"/> Pay interest to UC Invest Account: _____ <input type="checkbox"/> Pay interest to the <b>Nominated Account</b> in section 4 above
		<input type="checkbox"/> Add to this investment <input type="checkbox"/> Pay interest to UC Invest Account: _____ <input type="checkbox"/> Pay interest to the <b>Nominated Account</b> in section 4 above
		<input type="checkbox"/> Add to this investment <input type="checkbox"/> Pay interest to UC Invest Account: _____ <input type="checkbox"/> Pay interest to the <b>Nominated Account</b> in section 4 above

## 6. Adjust your signing instructions (joint investments only)

This signing instructions amendment will not alter or cancel any Telephone Transfer Service (TTS) authorities already in place.

Investment Number	Account Holder(s) Name	Interest Payment Method	
		<input type="checkbox"/> One signature required	<input type="checkbox"/> Two signatures required
		<input type="checkbox"/> One signature required	<input type="checkbox"/> Two signatures required
		<input type="checkbox"/> One signature required	<input type="checkbox"/> Two signatures required
		<input type="checkbox"/> One signature required	<input type="checkbox"/> Two signatures required
		<input type="checkbox"/> One signature required	<input type="checkbox"/> Two signatures required
		<input type="checkbox"/> One signature required	<input type="checkbox"/> Two signatures required

## 7. Notify a change of name

If you have legally changed your name please provide details of your new legal name and attach certified copies of supporting documentation which verifies the change.

**New Legal Name**

\_\_\_\_\_

Previous signature - SIGN BELOW

New signature - SIGN BELOW

## 8. Change of contact details

**Residential Address** \_\_\_\_\_

**Suburb** \_\_\_\_\_ **State** \_\_\_\_\_ **Postcode** \_\_\_\_\_

**Postal Address** (if different to above) \_\_\_\_\_

**Suburb** \_\_\_\_\_ **State** \_\_\_\_\_ **Postcode** \_\_\_\_\_

**Home Phone** \_\_\_\_\_ **Mobile** \_\_\_\_\_

**Work Phone** \_\_\_\_\_ **Fax** \_\_\_\_\_

**Email** \_\_\_\_\_

## 9. Sign Here to Authorise Changes

I acknowledge that the access and information changes requested above are governed by the UC Invest terms and conditions contained in the **Product Information Guide** and the **Electronic & General Access Guide**. I have read and understood the information contained within these documents and agree to be bound by the conditions of these documents in relation to my requested changes.

By requesting access to the Telephone Transfer Service on this form I request and authorise UC Invest (an activity of The Uniting Church in Australia Property Trust (S.A.) ABN 25 068 897 781, Debit User ID 186213 / 332875) to debit the amount that I may request from time to time from the nominated account listed in Section 4.

Authorised signatory - SIGN BELOW

Name

\_\_\_\_\_

Date

      /       /            

As an authorised signatory/joint account holder, I authorise the access and account information changes that have been requested in Sections 2, 3, 4, 5 and 6 of this form.

Authorised signatory / Joint account holder - SIGN BELOW

Name

\_\_\_\_\_

Date

      /       /            

### UC Invest

An activity of the Uniting Church SA | The Uniting Church in Australia Property Trust (S.A.) | ABN: 25 068 897 781  
Level 2, 212 Pirie Street, Adelaide | GPO Box 2145, Adelaide SA 5001

Phone: 1300 274 151 | Fax: (08) 8236 4250 | Email: [info@ucinvest.com.au](mailto:info@ucinvest.com.au) | Web: [www.ucinvest.com.au](http://www.ucinvest.com.au)

### Notice to Investors / Prospective Investors

UC Invest is an activity of The Uniting Church in Australia Property Trust (S.A.) ABN 25 068 897 781, the legal entity of the Uniting Church SA. Financial services are provided on behalf of the Uniting Church SA pursuant to ASIC Regulatory Guide 87, ASIC Class Order 02/184 exemption, s.911A Corporations Act 2011 (Cth) authorisation and APRA Banking Exemption No. 1 of 2006 ("The Uniting Church in Australia Property Trust (S.A.)").

Neither UC Invest nor the Uniting Church SA are prudentially supervised by the Australian Prudential Regulation Authority (APRA). Investments and contributions lodged with UC Invest will not benefit from the depositor protection provisions of the Banking Act 1959 (Cth). Investments in UC Invest are designed for investors who wish to support the charitable purpose of the Uniting Church SA and for who the consideration of profit is not of primary relevance.

### OFFICE USE ONLY

DATE RECEIVED

ENTERED BY