Young adult account transfer application

Bank Australia

A. Customer details

Title

Given names

Surname

Customer number

Date of birth

/ /

Home phone

Daytime phone

Mobile phone

Email

Residential address

Postcode

Mailing address

Postcode

Do you believe you are a PEP?*

◯ Yes ◯ No

Are you a tax resident of Australia?

◯ Yes ◯ No

Australian tax file number

Are you a tax resident of a country outside of Australia?

◯ Yes (Please complete required form CRS01 from our website) ◯ No

B. Security password

To enquire on your account with the help of a consultant, you will require a security password for confidentiality and security reasons. Without this password, your access will be restricted to making general enquiries.

Please write your unique security password in the space below (alpha/numeric, minimum 4 characters, maximum 16 characters). Obvious words or number sequences (eg. names, birthdays etc) will be rejected.

Please note that your password is similar to a PIN and, as such, should not be disclosed to anyone under any circumstances. If you provide your security password to a third party, your account may be restricted.

* Politically exposed persons (PEPs) are individuals who occupy a prominent public position or functions in a government body or international organisation, both within and outside Australia. This definition also extends to their immediate family members and close associates.

C. Account details

Please tick as appropriate

Account type (individuals)

◯ Everyday Access ◯ Bonus Saver ◯ mySaver (under 25 year olds only)

◯ Online Saver ◯ Christmas Saver

D. Investment account

Term deposit

Please invest Term: month/s or year/s

$ _____ _____

- We require 31 days' notice if you want to withdraw all or part of the term deposit before the maturity date.
- Funds will not be available until the 31st day after your request.
- If you think you may need to access funds immediately in the future, other deposit products may be more suitable.
- Your term deposit will renew automatically on maturity into a comparable term deposit, unless you tell us otherwise.
- After renewal, the applicable interest rate on the comparable term deposit may be lower than the interest rate we are paying now.

E. Services required

Please tick as appropriate

◯ Internet banking facility

F. Card/s required

The issue of cards is subject to approval in accordance with Bank Australia policy.

I/we would like to access my/our account using (please tick):

◯ Visa debit card

Please note that the above access card does not provide access to credit.

Where possible, Bank Australia will attempt to mail card/s and the Personal Identification Number (PIN) to the specified mailing address. Bank Australia will generally mail these on separate days. The issue of cards is subject to approval in accordance with Bank Australia policy.

Note: An Everyday Access transactional account is required to be able to have a Visa Debit card. If you have selected the Visa Debit card, Bank Australia will open an Everyday Access account and link this to your new card.

G. Remove Signatory/ies

Signatory 1

Remove full name

Customer number

◯ All Accounts ◯ Other (please specify)

Signatory 2

Remove full name

Customer number

◯ All Accounts ◯ Other (please specify)

H. Declaration

1. By being a Bank Australia customer, you agree to become a member of Bank Australia Limited, entitling you to one share and to be entered into our register of members.
2. I acknowledge that I have read the relevant 'Conditions of Use' relating to the applicable access product that I have applied for.
3. I further agree to and accept being bound by the terms and conditions specified.
4. I have read the Privacy Notification and consent to the contents therein.

Signature

Date / /

Please be aware that we require a physical signature on this form, once completed print off and sign before sending.

Bank Australia use only

◯ Card ordered ◯ IB linked ◯ Tax details loaded

◯ Password loaded ◯ Verification loaded in CRM ◯ Signatories removed

Operator number and initials

Checked by operator number and initials