

Term deposit application

Use this form to: Open a new term deposit account.

OFFICE USE Term deposit account :

1 YOUR DETAILS

Applicant 1

Full name:

Customer number:

Applicant 2

Full name:

Customer number:

Number of signatories to operate account: Anyone to sign All parties to sign Other (specify)

TFN already lodged TFN to be supplied

It is not compulsory to lodge a Tax File Number (TFN) but tax may be taken out of your interest if you do not quote your TFN or claim an exemption. See the General Information, Terms & Conditions brochure for further TFN information. TFNs, if being supplied, are required for all parties to an account.

2 INVESTMENT OPTION

Amount: Amount (in words):

Term:

Pay interest: On maturity Monthly Annually *Note: on a 12 month or longer term deposit the interest must be paid monthly or annually.*

3 MATURITY INSTRUCTIONS

Reinvest funds

Redeem term deposit funds into CUA account number:

Note: If we receive no instructions from you upon term deposit maturity, we will reinvest funds at the same term

4 INTEREST INSTRUCTIONS

Re-invest with original deposit on maturity. (Interest paid monthly or annually cannot be re-invested.)

To account number Name:

BSB (if applicable): Account:

Please allow 2 working days for the funds to be credited to your account at the other financial institution.

Please note: Where funds are to be transferred to a CUA account, we recommend that the account should be in the same name(s) as the Term Deposit.

5 METHOD OF DEPOSIT

Cheque attached

Transfer from another CUA account. (Please complete the following transfer authority and lodge at any CUA branch.)

I/We authorise CUA to transfer from our Everyday Account in the name of

account number to this term deposit.

6 PLEASE SIGN HERE

- a) I/We hereby make application for a term deposit with CUA as indicated and agree to be bound by the terms and conditions as outlined in the General Information, Terms and Conditions brochure.
- b) I agree for my personal information to be collected, used and disclosed in accordance with the Privacy Notice (see below) and the CUA Group's privacy policy.

Applicant 1's Signature:

Date:

Applicant 2's Signature:

Date:

PRIVACY NOTICE

How we collect your personal information

Credit Union Australia Ltd ("we", "us", "our") collects your personal information from you as well as third parties including joint account holders. We may also collect your personal information from other CUA Group companies.

Why we collect your personal information

We use your personal information to provide you with the accounts which you request including performing administrative functions to maintain your account, maintaining our relationship with you, ensure that our products remain competitive and keep you informed about our products and services. Anti-money laundering legislation also requires us to identify you before we can provide you with some of our products or services.

If you do not provide us with all of the information that we request, we may be unable to provide you with a product or service.

Other entities with which we share your personal information

We disclose your personal information to third parties including:

- our agents, assignees or contractors;
- service providers such as organisations which we use to verify your identity, IT software and/or support providers, mailing houses, payment system operators, debit card suppliers, research consultants, accountants, lawyers and auditors;
- government agencies such as taxation authorities, police, Centrelink and AUSTRAC as required or authorised by law;
- social media organisations and other virtual communities or networks where people create, share or exchange information. By using your personal information, such as your email address, in this way we can provide you with more specific and timely information through targeted communications. You can tell us at any time if you don't want us to make such disclosures and we won't make such disclosures and will not communicate with you in this way;
- courts and external dispute resolution schemes; and
- other companies within the CUA Group.

Some of our service providers to whom we disclose your personal information are located overseas. Please refer to our privacy policy for a list of the countries where they are located.

Our privacy policy

More information about how we handle your personal information is in the CUA Group APP Privacy & Credit Information Policy, available at cua.com.au. This policy contains information about:

- how you can access personal information that we hold about you;
- what to do if you think personal information we hold about you is inaccurate or incomplete;
- what to do if you believe that we have breached the Australian Privacy Principles and how we will handle your complaint.

The CUA Group is comprised of Credit Union Australia Limited, CUA Health Limited, CUA Financial Planning Pty Ltd and Credicorp Insurance Pty Ltd. Queries can be referred to our Privacy Dispute Officer by emailing privacydisputes@cua.com.au or writing to GPO Box 100, Brisbane QLD 4001.

Once you have completed this form:



Drop it into a branch



Submit it through online banking secure mail

We're here to help

If you need assistance completing this form, call us on **133 282** or drop into your local branch.