

Identification Requirements

In order to process your application we will need:

- Your completed application form
- Certified copy of identification for each Authorised Officer – photographic ID (e.g. Current Driver's License or current Australian Passport or one which has expired within the last two years) plus 1 (one) other document containing your name, and address or date of birth. (e.g. Current Driver's License without photograph or an Australian Birth Certificate/extract).
- Certified copy of an excerpt of the full Trust Deed which clearly states the name of the Self Managed Super Fund. (SMSF), type of SMSF, country where the SMSF was established, the full name and address of each Trustee and either the full name of each beneficiary in respect of the SMSF or details of the class if the terms of the SMSF identify the beneficiaries by reference to membership of a class.

SMSF Details

Name of SMSF			
ABN		Country where Trust established	
Trust Address	(PO BOX NOT ACCEPTABLE)		
	SUBURB / TOWN	State	Post code
Business Phone	()	Business Fax (Optional)	()
Email (Optional)			

Name(s) of all members of the SMSF

Full Name – Member 1	
Full Name – Member 2	
Full Name – Member 3	
Full Name – Member 4	

Who can be an Authorised Officer?

An individual who is a trustee of the SMSF. Each trustee must complete this section. Maximum number of 4 (four) Authorised Officers per SMSF. An Authorised Officer is permitted to perform financial transactions if a Signatory is indicated on the Authorised Officers Signatures section of this form.

Who can be a signatory on the account?

The trustee(s) of the SMSF can nominate a non trustee individual to be a signatory to this account. Signatories can be added and removed at any time after account opening at the request of Authorised Officers.

Please contact the bank if you wish to arrange to add signatories.

Authorised Officer Details – Individual/Directors/Trustees/Partners

Authorised Officer 1	TITLE	GIVEN NAMES (IN FULL)		
	SURNAME			
Preferred Name				
Residential Address	(PO BOX NOT ACCEPTABLE)			
	SUBURB / TOWN		State	Post code
Mailing Address	<input type="checkbox"/> If same as Residential	STREET NUMBER AND NAME OR PO BOX NUMBER		
	SUBURB / TOWN		State	Post code
Phone (Work)	()	Phone (Home)	()	
Date of Birth			Mobile	
Password			Occupation	

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Authorised Officer 2	TITLE	GIVEN NAMES (IN FULL)		
	SURNAME			
Preferred Name				
Residential Address	(PO BOX NOT ACCEPTABLE)			
	SUBURB / TOWN		State	Post code
Mailing Address	<input type="checkbox"/> If same as Residential	STREET NUMBER AND NAME OR PO BOX NUMBER		
	SUBURB / TOWN		State	Post code
Phone (Work)	()	Phone (Home)	()	
Date of Birth			Mobile	
Password			Occupation	

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*An Authorised Officer can open and close accounts and authorise changes or additions to Authorised Officers, signatories and Operating Authorities for all accounts opened in the name of the SMSF. This authority also extends to effecting changes to details supplied to Suncorp for the SMSF. Any accounts subsequently opened under an Opening Authority will be opened in the name of the SMSF.

Authorised Officer Details – Individual/Directors/Trustees/Partners - continued			
Authorised Officer 3	TITLE	GIVEN NAMES (IN FULL)	
	SURNAME		
Preferred Name			
Residential Address	(PO BOX NOT ACCEPTABLE)		
	SUBURB / TOWN	State	Post code
Mailing Address	<input type="checkbox"/> If same as Residential	STREET NUMBER AND NAME OR PO BOX NUMBER	
	SUBURB / TOWN	State	Post code
Phone (Work)	()	Phone (Home)	()
Date of Birth		Mobile	
Password		Occupation	
Do not send me product/marketing material or Special Offers from Suncorp <input type="checkbox"/>			
Authorised Officer 4	TITLE	GIVEN NAMES (IN FULL)	
	SURNAME		
Preferred Name			
Residential Address	(PO BOX NOT ACCEPTABLE)		
	SUBURB / TOWN	State	Post code
Mailing Address	<input type="checkbox"/> If same as Residential	STREET NUMBER AND NAME OR PO BOX NUMBER	
	SUBURB / TOWN	State	Post code
Phone (Work)	()	Phone (Home)	()
Date of Birth		Mobile	
Password		Occupation	
Do not send me product/marketing material or Special Offers from Suncorp <input type="checkbox"/>			
Beneficiary Details			
Do the terms of the trust identify the beneficiaries by reference to a membership of a class?			
Provide Details of each Class			
Or			
Full Name of each Beneficiary	1.		
	2.		
	3.		
	4.		
	5.		
	6.		

Opening Authority – Number to Sign to Open NEW SMSF CUSTOMERS ONLY

Please identify how many Authorised Officers you would like to open and close accounts and authorise changes or additions to Authorised Officers, signatories and operating authorities for all accounts in the name of the SMSF.

Any accounts subsequently opened under an Opening Authority will be opened in the name of the SMSF. This authority also extends to effecting changes to details supplied to Suncorp for the SMSF.

Operating Authority – Number to Sign to Operate

• Please identify how many Authorised Officers/signatories you would like to be able to perform financial transactions on the account?

Only 1 Any 2 can sign

Special Signing Conditions (Optional)

Choose your account

Business Everyday Account Business Premium Account Business Saver Account Term Deposit

Cheque Book Order Details

Name to appear on Cheque book

Cheque book size options 15 50 200

Statement Details

A statement of account will be sent in accordance with the terms and conditions of Suncorp Deposit accounts. If you would like a copy of the Account Statement sent to an address different to the nominated mailing address (eg Accountant etc), then please complete the following details:

Name

Address

SUBURB / TOWN

State

Post code

Interest Payment Method

Reinvest in this account

Redirect to another Suncorp account
(Available on selected products only)

Account Number

Account Name

Term Deposit Details

Investment Details

Funding Instructions Account Transfer Cheque Deposit

Suncorp Account Number

Amount \$ Term Length Days Interest Rate %

Interest Payment Instructions (must be a Suncorp Account)

Pay Interest Monthly Quarterly Half Yearly Annually Maturity

Suncorp Account No.

Suncorp Account Name (Must be in the same name as the Term Deposit)

Renewal Instructions (not applicable to Negotiated Term Deposits) Renew Principal and Interest for the same term at the then current rate Renew Principal

Principal Payment Instructions (must be a Suncorp Account)

Mature Principal and Interest Mature Principal

Suncorp Account No.

Suncorp Account Name (Must be in the same name as the Term Deposit)

Appointment of an Agent

I/We appoint

to be my/our agent for the purposes of obtaining information from Suncorp in relation to accounts in the name of the SMSF including account numbers, balances, account transactions, term deposit maturity details and other information as required. Where a firm has been appointed as my/our agent this authority extends to any individual person employed by the firm. I/We authorise Suncorp to contact my/our agent and accept instructions from the agent in relation to any renewal or reinvestment of a Term Deposit.

Privacy Statement

Suncorp-Metway Limited is a member of the Suncorp Group. The Privacy Act 1988 (Cth) requires us to inform you that:

Purpose of collection

Personal information is information about an identifiable individual and includes facts or an opinion about you which identifies you or by which your identity can be reasonably determined. The collection of your personal information is essential to enable us to conduct our business of offering and providing you with our range of financial products and services.

We collect personal information for the purposes of:

- identifying and protecting you when you do business with us;
- establishing your requirements and providing the appropriate product or service;
- setting up, administering and managing our products and services;
- assessing and investigating, and if accepted, managing a claim made by you under one or more of our products; and
- training and developing our staff and representatives

We may be required by law to collect your personal information. These include, but are not limited to, anti-money laundering and taxation laws.

Consequences if personal information is not provided

If we request personal information about you and you do not provide it, we may not be able to provide you with the financial product or service that you request, or provide you with the full range of services we offer.

Disclosure

We use and disclose your personal information for the purposes we collected it.

We may also use and disclose your personal information for a secondary purpose that is related to the purpose for which we collected it. This would happen in cases where you would reasonably expect us to use or disclose your personal information for that secondary purpose.

In the case of sensitive information, any secondary purpose, use or disclosure will be directly related to the purpose of collection.

When necessary and in connection with purposes of collection, we may disclose your personal information to and/or collect your personal information from:

- other companies within the Suncorp group;
- where required or authorised under our relationship with our joint venture companies;
- information technology providers, including hardware and software vendors and consultants such as programmers;
- research and development service providers;
- your advisers, agents or representatives;
- our advisers, agents or representatives;
- if required or authorised to do so, regulatory bodies and government agencies;
- financial advisers;
- lenders' mortgage insurers and valuers;
- credit reporting agencies;

- legal and other professional advisers;
- printers and mail house service providers;
- manufacturers for plastic card production (e.g. debit and credit cards);
- external dispute resolution schemes

Disclosure overseas

There are also instances where we may have to send your personal information overseas or collect personal information from overseas. These instances include:

- sending your personal information to companies in the Suncorp group;
- when you have asked us to do so;
- when we are authorised or required by law to do so;
- when we have outsourced a business activity or function to an overseas service provider with whom we have a contractual arrangement;
- certain electronic transactions; or
- when it is necessary in order to facilitate a transaction on your behalf.

We will only send your personal information overseas or collect personal information about you from overseas for the purposes in this statement.

Access

You can request access to the personal information we hold about you by contacting us.

In some circumstances, we are able to deny your request for access to personal information. If we deny your request for access, we will tell you why. If accessing your personal information will take an extended period of time, we will inform you of the likely delay. For more detailed requests for access to personal information, for example, access to information held in archives, a fee may be charged to cover the associated cost of retrieval and supplying this information.

Marketing

We would like to use and disclose your personal information to keep you up to date with the range of products and services available from Suncorp. Generally, our companies in the Suncorp group will use and disclose your personal information for Suncorp's marketing purposes.

If you do not want us to use and disclose your personal information for the purpose of marketing products and services to you, you should contact us and tell us.

Contact

Please contact us to:

- change your mind at any time about receiving marketing material;
- request access to the personal information we hold about you; or
- obtain more information about our privacy practices by asking for a copy of our Privacy Policy;

You can contact us by calling 13 11 75 or contacting us at suncorpbank.com.au or by visiting any of our branches.

Our Privacy Policy can also be found on our website at suncorpbank.com.au at the bottom of the page by clicking on "Privacy".

Declaration & Consent

I/We understand it is an offence under the "Anti-Money Laundering and Counter-Terrorism Financing Act 2006" to make a false or misleading statement.

I/We agree to be bound by the Terms and Conditions detailed in the Product Information Document in relation to accounts opened under the above account name. I/We confirm the details supplied are correct.

By signing this application, I/We agree to Suncorp collecting, using and disclosing my/our personal information, including sensitive and health information if applicable, in accordance with the Privacy Statement included in this document and the Suncorp Privacy Policy.

Sometimes, Suncorp might use personal information to make product-related material on a range of financial products and services available

to our customers. A customer may elect not to receive product-related material by indicating in Customer Details Section.

I/We agree to Suncorp transmitting my/our personal information by electronic means as well as contacting me by SMS Messaging and/or E-Mail regarding my account where I have included my mobile telephone number or E-Mail address as part of this application. I accept that there is a risk that information may come into the possession of another person not entitled to receive it and acknowledge that while Suncorp will take all reasonable steps to protect my privacy it accepts no liability for breach of confidentiality or damages for loss I might suffer provided Suncorp can show it communicated to me at the electronic address or number provided by me.

Tax File Numbers

Tax File Number	<input type="text"/>
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If you do not provide a TFN for the SMSF, tax may be deducted from the interest earned on the account at the highest marginal rate. Further information can be obtained from the Australian Taxation Office.

Authorised Officers Signatures

Authorised Officer 1	FULL NAME		
Date	<input type="text"/>	Position	EG.: DIRECTOR
Signatory	<input type="checkbox"/> Yes <input type="checkbox"/> No	SIGNATURE	

Authorised Officer 2	FULL NAME		
Date	<input type="text"/>	Position	EG.: DIRECTOR
Signatory	<input type="checkbox"/> Yes <input type="checkbox"/> No	SIGNATURE	

Authorised Officer 3	FULL NAME		
Date	<input type="text"/>	Position	EG.: DIRECTOR
Signatory	<input type="checkbox"/> Yes <input type="checkbox"/> No	SIGNATURE	

Authorised Officer 4	FULL NAME		
Date	<input type="text"/>	Position	EG.: DIRECTOR
Signatory	<input type="checkbox"/> Yes <input type="checkbox"/> No	SIGNATURE	

Internal Use Only:

New Account Number(s)	<input type="text"/>			
Effective Open Date	<input type="text"/>	Term Deposit Type	<input type="checkbox"/> QLD <input type="checkbox"/> Non QLD <input type="checkbox"/> Campaign <input type="checkbox"/> Negotiated	
Hold/s Applies	<input type="text"/>	Negotiated Rate Code	<input type="text"/>	

Internal Use Only:

Branch/Agent Name	<input type="text"/>		
Second Officer Code	<input type="text"/>	Sales Officer Code	<input type="text"/>
Broker Code	<input type="text"/>	Promo Code	<input type="text"/>
NAME	SIGNATURE	USER ID	DATE

Processed and Verified by:

VERIFIER'S NAME	VERIFICATION DATE
USER ID	