

# ANFIN Parishdirect form

## IMPORTANT INFORMATION FOR INVESTORS – PLEASE READ

Anglican Financial Services (ANFIN) is owned and operated by The Corporation of the Synod of the Diocese of Brisbane ("Anglican Church Southern Queensland"). Neither the Anglican Church Southern Queensland nor ANFIN is prudentially supervised by the Australian Prudential Regulation Authority ("APRA"). Contributions to ANFIN do not obtain the benefit of the depositor protection provisions of the *Banking Act 1959* (Cth). The normal protections that would apply under the *Corporations Act* do not apply. ANFIN's investment products have not been examined or approved by the Australian Securities and Investments Commission ("ASIC"). Investors should be aware that ANFIN is not subject to the normal requirement to have a disclosure document or Product Disclosure Statement and be registered or have a trust deed under the *Corporations Act*. ANFIN is designed for investors who wish to promote the charitable purposes of the Anglican Church Southern Queensland and for whom the considerations of profit are not of primary relevance in the investment decision. ANFIN recommends that you obtain your own financial advice before making an investment with ANFIN.

This form may be lodged by:

**Post**

GPO Box 421 Brisbane QLD 4001

**Fax**

(07) 3835 2299

**Email**

askus@anfin.com.au

Helpful hints for completing this application:

- Allow two business days for your request to be processed.
- If you have an existing Parishdirect arrangement, please provide your authority number at step 2 below.
- Please check external account details carefully. It is your responsibility to ensure these details are correct. Incorrect details may result in loss of funds and ANFIN does not guarantee their recovery.

Please use BLOCK LETTERS in BLACK OR BLUE PEN ONLY and  tick required choices

### STEP 1 – PLEASE TICK OPTION REQUIRED

- New Parishdirect (complete steps 2, 3, 4, 5, 6, 7 and 8)
- Change the account/card details of an existing Parishdirect (complete steps 2, 3, 7 and 8)
- Change the giving amount of an existing Parishdirect (complete steps 2, 5, 7 and 8)
- Change the frequency of an existing Parishdirect (complete steps 2, 6, 7 and 8)
- Change the parish of an existing Parishdirect (complete steps 2, 4, 7 and 8)
- Cancel a Parishdirect (complete steps 2 and 8)

### STEP 2 – YOUR DETAILS

Title	Given names	Surname	Authority number (Office use only)
Postal Address	Suburb	State	Postcode
Email	Telephone	Mobile	

### STEP 3 – PLEASE SELECT AND COMPLETE ONE OPTION ONLY

- Option 1** – Please debit my/our financial institution account:

I/we request and authorise Anglican Financial Services (ANFIN) to arrange for any amount specified below through the Bulk Electronic Clearing System from an account held at the financial institution identified below subject to the terms and conditions of the Direct Debit Request (DDR) Service Agreement and any further instructions provided below.

Account Name	Financial Institution
BSB Number	Branch Name
	Account Number

- Option 2** – Please debit my card:

This is not covered by the DDR Service Agreement. Normal credit card conditions apply

Cardholder's name:	Card number:
<input type="checkbox"/> Mastercard	<input type="checkbox"/> Visa Card
	Card expiry date:

**STEP 4 – DETAILS OF THE ANGLICAN PARISH YOU WISH TO GIVE TO**

Parish name

**STEP 5 – AMOUNT TO BE DEBITED FROM YOUR ACCOUNT/CARD**

Amount to be debited

**STEP 6 – FREQUENCY OF PARISHdirect**

Commencement date

Expiry date

OR  Until further notice  
OR  One off payment

Weekly     Fortnightly     Monthly     Yearly     Other

**STEP 7 – DISCLOSURE OF PERSONAL DETAILS**

For record keeping purposes, many parishes prefer to have access to the names of parishioners giving via ANFIN Parishdirect. Please be assured that you are not required to disclose this information. If you wish your giving to remain anonymous you may do so. Please indicate your choice below.

- Yes, I authorise the Anglican Financial Services to disclose my / our name/s to the parish nominated above. I understand that details of my giving, including my name and the amount of my giving will appear on statements sent to the parish.
- No, I do not wish for my / our details to be disclosed to the parish nominated above.

**STEP 8 – AUTHORISATION AND ACKNOWLEDGEMENT OF ACCOUNT CARD HOLDER**

By signing this Direct Debit Request you acknowledge that you have read this and understand the terms and conditions of the Direct Debit Request Agreement (overleaf) under which debit arrangements are made between you and ANFIN as detailed in this Direct Debit Request and in your Direct Debit Request Agreement.

**ACCOUNT HOLDER SIGNATURE**

**ACCOUNT HOLDER SIGNATURE**

Print full name

Print full name

Date

Date

**Office Use Only**

- Assign authority number
- Direct debit transfer created/amended in the system
- Parishioner details entered into Parishdirect database
- Letter sent to client

Processed by:  Date:

Reviewed by:  Date:

RIM.....
DATE .....
DOC TYPE: PARISHdirect .....
.....
ACCOUNT .....
REFERENCE .....
.....
INITIAL .....

## **DIRECT DEBIT REQUEST SERVICE AGREEMENT**

### **DEFINITIONS**

“Account” means your investment held at the Payer from which we are authorised to arrange for funds to be debited.

“ANFIN”, “us” or “we” means The Corporation of the Synod of the Diocese of Brisbane trading as Anglican Financial Services ABN 51 925 884 864.

“Business Day” means a day, other than a Saturday or Sunday or a public holiday in Brisbane, Queensland.

“Debit Day” means the day that payment by you to us is due.

“Debit Payment” means a particular transaction where your account is debited.

“Direct Debit Request (DDR)” means the DDR between you and us by which you authorise your Account to be debited.

“you” means the customer who signed the DDR.

“Payer” means the financial institution set out in the DDR where you hold the account.

### **DEBITING THE ACCOUNT**

By signing a DDR you have authorised us to arrange for funds to be debited from your Account with the Payer. Direct debiting through the Bulk Electronic Clearing System (BECS) may not be available on all types of accounts which may be conducted by you. You should refer to the DDR and this agreement for the terms of the arrangement between us and you. It is your responsibility to ensure that the particulars of the Account are properly and accurately recorded on the DDR and that the authorisation on the DDR accurately records your wishes. We will not be responsible for any inaccuracies in the DDR. We will only arrange for funds to be debited from your Account as authorised in the DDR. If the Debit Day falls on a day that is not a Business Day, we may direct the Payer to debit your Account on the following Business Day.

### **CHANGES BY US**

We may vary any details of this Agreement at any time by giving you at least fourteen (14) days' written notice.

### **CHANGES BY YOU**

If you wish to **stop** or **defer** a Debit Payment or to cancel or change your authority for us to debit the Account at any time, you must notify us in writing at least 14 days before the next Debit Day. Our address is set out on the back of this brochure

### **YOUR OBLIGATIONS**

It is your responsibility to ensure that there are sufficient clear funds available in the Account to allow a Debit Payment to be made in accordance with the DDR. If there are insufficient funds you may:

- a) be charged a fee and/or interest by the Payer; and
- b) incur fees or charges imposed or incurred by us.

You should check the Account statement to verify that the amounts debited or deducted from the Account are correct.

### **DISPUTES**

If you believe that there has been an error in debiting the Account, you should notify us directly on (07) 3835 2355 and confirm that notice in writing with us as soon as possible so that we can resolve your query more quickly. If we conclude, as a result of our investigations, that the Account has been incorrectly debited we will request the Payer to adjust the Account (including interest and charges) accordingly. We will also, if possible, notify you in writing of the amount by which the Account has been adjusted. If we conclude, as a result of our investigations, that the Account has not been incorrectly debited we will provide you with reasons. Any queries you may have about an error made in debiting the Account should be directed to us in the first instance so that we can attempt to resolve the matter between you and us. If we cannot resolve the matter you can still refer it to the Payer who will obtain details from you of the disputed transaction. If there is a dispute between you and us (that is not a dispute between you and the Payer) you may refer that dispute to Australian Financial Complaints Authority Limited, GPO Box 3 Melbourne, Victoria 3001, telephone 1800 931 678.

### **PRIVACY**

The Corporation of the Synod of the Diocese of Brisbane (Anglican Church Southern Queensland) trading as Anglican Financial Services (ANFIN) collects personal information about people who sign up to contribute via ParishDirect. The primary purpose of collecting this is to allow ANFIN to exercise its functions and activities and ultimately to enable you to contribute to your parish via ParishDirect. ANFIN collects, uses, holds and discloses personal information in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles (APPs). If ANFIN does not obtain personal information from you, it will not be possible for you to contribute via ParishDirect. Personal Information may be disclosed to others for administrative purposes including your financial institution set out in the DDR. Indue Limited ABN 97 087 822 464, as sponsor of our participation in the BECS may require such information to be provided to it in connections with a claim made on it relating to an alleged incorrect or wrongful debit. Personal information collected on this form will be used for marketing purposes by the Anglican Church Southern Queensland and ANFIN. You may seek to access information collected about you by contacting the General Manager of the Anglican Church Southern Queensland. Access to personal information is dealt with in accordance with the Anglican Church Southern Queensland's Privacy Policy located at [anglicanchurchsq.org.au/privacy-policy](http://anglicanchurchsq.org.au/privacy-policy) (“Privacy Policy”). You may seek to have personal information corrected. Correction of personal information is dealt with in accordance with the Privacy Policy. You may make a complaint in accordance with the Privacy Policy if you believe ANFIN has breached the APPs.