

# Personal Savings Account Application



Date / /

## OFFICE USE ONLY

Account Number:

## 1. Account Information

### [a] Account Type (tick one)

- Individual Complete Section 1 and Section 2(a) and 3.  
 Joint Complete Sections 1 and Section 2 and 3.

### [b] Account Details

Account Name

Correspondence Address

Postcode

Daytime Phone

Withdrawals to be signed by (tick one):

- ONE signatory  TWO signatories

## 2. Account Signatories

### [a] Signatory 1

Title  YES, I require internet access

Surname

Given Names

Date of birth / /  Male  Female

Residential Address

Postcode

Postal Address

Postcode

Mobile Phone

Email

Tax File Number

Are you a tax resident of a country other than Australia?  Yes  No

Drivers Licence No. State

Are you a Politically Exposed Person? (see definition overleaf)  Yes  No

I agree to the terms contained in the Notice to Depositors overleaf.

Signature 1

X

## 2. Account Signatories (continued)

### [b] Signatory 2

Title  YES, I require internet access

Surname

Given Names

Date of birth / /  Male  Female

Residential Address

Postcode

Postal Address

Postcode

Mobile Phone

Email

Tax File Number

Are you a tax resident of a country other than Australia?  Yes  No

Drivers Licence No. State

Are you a Politically Exposed Person? (see definition overleaf)  Yes  No

I agree to the terms contained in the Notice to Depositors overleaf.

Signature 2

X

If more than two signatories are required, please attach another Account Application.

## 3. Special instructions

### Matching Deposit

I/we elect to make this account a matching deposit to support the following Lutheran organisation. This will not change the operation of this account and the balance will be added to a pool of funds enabling the organisation to apply for a low interest LLL loan up to the amount of the pool.

Lutheran Organisation

### Non Interest-Bearing

I/we elect to provide additional support to the following Lutheran organisation by nominating this account to be non interest-bearing. As a result the LLL will provide an annual grant to this organisation based on 5% of the total non interest-bearing deposits held for this organisation.

Lutheran Organisation

## Notice to Depositors

**Investing with LLL:** Investments in the Lutheran Laypeople's League (LLL) are designed for investors who wish to support the charitable purposes of the LLL and for whom the consideration of profit is not of primary relevance. The LLL is not prudentially supervised by the Australian Prudential Regulation Authority. Therefore, an investor in the Fund will not receive the benefit of the financial claims scheme or the depositor protection provisions of the Banking Act 1959. Investments in the Fund are intended to be a means for investors to support the charitable purposes of the Fund.

The LLL operates a charitable investment scheme. The scheme is not subject to the normal disclosure or trust deed provisions of the Corporations Act 2001. Accordingly, the scheme has not been examined or approved by ASIC.

Refer to the LLL ASIC Identification Statement available at [www.lll.org.au](http://www.lll.org.au) for further information.

**Australian Financial Services Licence:** The LLL holds an Australian Financial Services Licence (AFSL) No. 329339 issued by ASIC, which authorises the LLL regarding its non-cash payment facility. This facility is the LLL@Home Internet Access Service (LLL@Home) offered through the LLL website at [www.lll.org.au](http://www.lll.org.au). You should obtain and read the Product Disclosure Statement (PDS), available at [www.lll.org.au](http://www.lll.org.au) or by calling 1800 556 457, and consider it before making any decision about whether to use LLL@Home.

**Financial Product Advice:** LLL's documents and website contain factual information only and do not constitute financial product advice or imply any recommendation or opinion. The LLL is not licensed to provide product advice for LLL@Home Internet Access and is only authorised to provide general advice in offer documents for LLL savings accounts. You should consider whether the intended relationship with the LLL fits your objectives, financial situation and needs. You should seek independent advice before making any financial decisions.

**Interest Rates:** LLL interest rates are subject to change without notice. Refer to our website or contact us for our current interest rate.

**Privacy Notice:** The Privacy Act allows the LLL to disclose personal information about you when related to the primary purpose of providing our products and services to you and managing our business. Personal information may include details to identify you and verify your identity, such as your name, sex, date of birth and current address. If you do not provide us with the personal information that we request, we may not be able to consider your application or provide other services. In some circumstances, we will need to provide your details to another organisation within Australia. They include external service providers to us, such as organisations which we use to verify your identity, payment systems operators, our lawyers and auditors, your representative for example, lawyer, financial advisor or attorney, as authorised by you,

or government and regulatory authorities if required. We will not disclose your personal information to third parties overseas. You represent that if at any time you supply us with personal information about another person, you are authorised to do so; and you agree to inform that person who we are, how to contact us, and how to obtain our Privacy Policy, and that we will use and disclose their personal information for the purposes set out in this Notice and that they can gain access to that information by contacting us. We take all reasonable steps to ensure that all your personal information held by us, is protected from misuse, interference and loss, and from unauthorised access, disclosure or modification. Our Privacy Policy [www.lll.org.au/privacy](http://www.lll.org.au/privacy) provides additional information about how we handle your personal information. It also explains how you can complain about a breach of the Privacy Act and how we will deal with your complaint. We will give you a copy of our Privacy Policy on request. Our Privacy Officer's contact details are: Lutheran Laypeople's League, PO Box 45, North Adelaide SA 5006 1800 556 457 [privacy.officer@lll.org.au](mailto:privacy.officer@lll.org.au)

**Tax File Numbers/Exemptions:** Although it is not compulsory to supply your TFN or Exemption details, if you choose not to, under Government regulations the LLL is obliged to deduct withholding tax from interest earned on this account at the highest marginal rate of tax, plus Medicare levy. Pensioners may either quote their TFN or list their Pension type.

**Anti Money Laundering and Counter Terrorism Financing (AML/CTF) Act 2006:** By signing this application form you are providing your express consent to collect personal information from you as required by the AML/CTF Act and that LLL may take steps to verify the personal information it has collected. You consent to the collection, use, handling, disclosure and verification of information, including the use of on-line verification, as required by law. Where LLL utilises on-line verification, it will only use the assessment provided by the Reporting Body for the purpose of verifying your identity in accordance with the AML/CTF Act.

**Politically Exposed Person:** A Politically Exposed Person is an individual, family member or close associate of an individual who holds a prominent public position either domestically or internationally in a government body or international organisation. Examples include politicians, senior government or political party officials, judicial officers, senior military officers, or directors or senior executives from the public service or international organisations.

**Third Parties:** The LLL relies upon and contracts with third parties to deliver a number of its services and advises that those parties hold relevant licences and registrations as required under legislation and relevant statutory authorities within Australia.

The information provided is current at the date of publication but may be subject to change.