

**TRUST DETAILS**

|                                 |  |                      |                      |   |                      |                                  |                      |                      |
|---------------------------------|--|----------------------|----------------------|---|----------------------|----------------------------------|----------------------|----------------------|
| Trust Name                      |  |                      | ABN                  |   |                      | Account Number (Office use only) |                      |                      |
| <input type="text"/>            |  |                      | <input type="text"/> |   |                      | <input type="text"/>             |                      |                      |
| Registered Address (Mandatory)  |  |                      |                      | Mailing Address (if different from registered office) |                      |                                  |                      |                      |
| <input type="text"/>            |  |                      |                      | <input type="text"/>                                  |                      |                                  |                      |                      |
| Suburb                          |  | State                | Postcode             |   | Suburb               |                                  | State                | Postcode             |
| <input type="text"/>            |  | <input type="text"/> | <input type="text"/> |   | <input type="text"/> |                                  | <input type="text"/> | <input type="text"/> |
| Email                           |  |                      |                      | Office Phone Number                                   |                      | Mobile Number                    |                      |                      |
| <input type="text"/>            |  |                      |                      | <input type="text"/>                                  |                      | <input type="text"/>             |                      |                      |
| Country where Trust established |  |                      |                      | Type of Trust   |                      |                                  |                      |                      |
| <input type="text"/>            |  |                      |                      | <input type="text"/>                                  |                      |                                  |                      |                      |

**Tax File Number Notification:**

Please provide your Tax File Number (TFN). Not quoting your TFN may result in tax being taken out of your interest.

I/We do not wish to provide Australian Military Bank with our TFN.

**Corporate Trustee details (where relevant)**

|                      |                      |
|----------------------|----------------------|
| Company Name         | ACN                  |
| <input type="text"/> | <input type="text"/> |

**ACCOUNT METHOD OF OPERATION**

One account holder to sign  Two account holders to sign

**ACCOUNT OPTIONS\***

Select your account options:

SSDIY Super Saver or  DIY Super Saver and Term Deposit

|                      |                      |                      |
|----------------------|----------------------|----------------------|
| Amount               | Term                 | Rate                 |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

This will be funded from your SSDIY Super Saver account and proceeds will be paid to this account.

\*Terms and Conditions apply. Please refer to the Terms and Conditions and Schedule of Fees and Charges available on our website.

Maturity Instructions:

- Reinvest principal only  
 Reinvest principal and interest  
 Pay proceeds to SSDIY Super Saver.

**OFFICE USE ONLY**

- Trustees verified  Trust name verified  FSG supplied  T&C supplied  F&C supplied  
 Privacy statement supplied  Internet Banking access granted to Signatories/owners  Events loaded to Interaction

|                                |                      |                      |                       |
|--------------------------------|----------------------|----------------------|-----------------------|
| Staff Name and Operator Number | Supervisor Signature | Date / /             | Member Number Created |
| <input type="text"/>           | <input type="text"/> | <input type="text"/> | <input type="text"/>  |

## INDIVIDUAL TRUSTEE/DIRECTOR DETAILS

**Person 1**  Individual Trustee  Director  
 Business Banking Administrator (Max. 2 administrators)

Member Number  or Client Number (office use only)

Title  Given Name(s)  Other Name(s)

Surname  Date of Birth  /  /

Home Phone  Mobile

Rank (if applicable)

Residential Address

Suburb  State  Postcode

Email address

Country of Residence

Citizenship

Are you a Tax Resident in a jurisdiction other than Australia?  
 Yes  No

If yes, please specify the country and provide your Tax Identification Number (TIN):

|                      |                      |
|----------------------|----------------------|
| Country 1            | TIN                  |
| <input type="text"/> | <input type="text"/> |
| Country 2            | TIN                  |
| <input type="text"/> | <input type="text"/> |
| Country 3            | TIN                  |
| <input type="text"/> | <input type="text"/> |

**Person 2**  Individual Trustee  Director  
 Business Banking Administrator (Max. 2 administrators)

Member Number  or Client Number (office use only)

Title  Given Name(s)  Other Name(s)

Surname  Date of Birth  /  /

Home Phone  Mobile

Rank (if applicable)

Residential Address

Suburb  State  Postcode

Email address

Country of Residence

Citizenship

Are you a Tax Resident in a jurisdiction other than Australia?  
 Yes  No

If yes, please specify the country and provide your Tax Identification Number (TIN):

|                      |                      |
|----------------------|----------------------|
| Country 1            | TIN                  |
| <input type="text"/> | <input type="text"/> |
| Country 2            | TIN                  |
| <input type="text"/> | <input type="text"/> |
| Country 3            | TIN                  |
| <input type="text"/> | <input type="text"/> |

Note: A TIN is the tax reference number issued to you by the tax office in the country where you are a resident for tax purposes. Where a country does not issue a TIN, complete an equivalent number, for example a social security, national insurance, personal identification or a resident registration number.

Are you a Politically Exposed Person (PEP)?  
 Yes  No

Are you a Politically Exposed Person (PEP)?  
 Yes  No

A Politically Exposed Person (PEP) is someone who performs important public functions. For example:

- A high ranking member of the armed forces (top three senior levels of each service)
- Heads of state, government and cabinet ministers
- Senior government officials
- Senior executive of state-owned organisation

A PEP is also the immediate family member of a person referred to above, including a spouse, defacto partner or child.

## DECLARATION AND SIGNATURE

You agree to become a member of Australian Military Bank when we open this account. For further information about membership, please refer to our Constitution. The Trustee acknowledges that it is responsible for ensuring that any persons appointed as nominated officer or signatory on the account conduct themselves responsibly and in accordance with the instructions of the Trustee.

### Marketing and other purposes

From time to time Australian Military Bank may contact you with news, services, products, offers and promotions. This may happen via mail, email, SMS or telephone. Our Privacy Policy is available at [australianmilitarybank.com.au](http://australianmilitarybank.com.au).

Opt out of communications

### Personal information

I/We acknowledge and agree that Australian Military Bank and any company related to Australian Military Bank can collect and disclose my personal information as required by law.

I/We agree that if Australian Military Bank engages anyone (a Service Provider) to do something on its behalf then Australian Military Bank and the service provider may exchange with each other any personal information the service provider lawfully obtains about me/us in the course of acting on Australian Military Bank's behalf. Service providers may include but are not limited to solicitors and legal advisers, accountants and auditors, property valuers, printers and mailing services, insurers and mortgage insurers, financial planners, retirement product managers, credit card issuers, ATM/EFTPOS service providers, collection agencies, conveyancers, credit reporting agencies, and Government agencies which regulate our products and services.

Individual Trustee/Director 1 Signature

Individual Trustee/Director 2 Signature

Print Name

 Date / /

Print Name

 Date / /