

**1. TRUST DETAILS**

Trust Name			Australian Business Number		Account Number (Office use only)		
<input type="text"/>			<input type="text"/>		<input type="text"/>		
Street Address (Mandatory - PO Box not acceptable)				Mailing Address (if different from Street Address)			
<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 (default address for all correspondence)				Landline Phone Number		Mobile Phone 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.

**2. ACCOUNT METHOD OF OPERATION**

One to sign  Two to sign

**3. ACCOUNT OPTIONS\***

All SMSF must have a DIY Super Save account, if you wish to invest in term deposit please complete application for term deposit and return it along with this application.

**4. TRUSTEE DETAILS**

- Individual Trustee (go to section 5)  
 Corporate Trustee (go to section 5 and also Complete Domestic Company Application)

**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   
 Relationship linking

Staff Name and Operator Number

Supervisor Signature

Member Number Created



Date / /

## 5. INDIVIDUAL TRUSTEE/DIRECTOR DETAILS

**Person 1**  Individual Trustee  Director

Member Number (if applicable) or Client Number (office use only)

Given Name(s)

Other Name(s)

Surname

Date of Birth

Home Phone Number

Mobile Phone Number

Residential Address

Suburb

State

Postcode

Email

**Person 2**  Individual Trustee  Director

Member Number (if applicable) or Client Number (office use only)

Given Name(s)

Other Name(s)

Surname

Date of Birth

Home Phone Number

Mobile Phone Number

Residential Address

Suburb

State

Postcode

Email

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

Country 2

TIN

Country 3

TIN

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

Country 2

TIN

Country 3

TIN

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.

## 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). If you would like to opt out of this communication, please contact us to remove you off the mailing and contact list.

### 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.

Print Name

Signature

 Date / /

Print Name

Signature

 Date / /