



CATHOLIC DEVELOPMENT FUND
NEW DEPOSITOR DETAILS – PERSONAL

Surname(s): _____

Given names: _____

Title _____

Residential _____

Address: _____

Postal Address: _____

(if different) _____

Telephone (Bus) _____

(Private) _____

(Fax) _____

(E-mail) _____

Occupation: _____

Date of Birth: _____

Gender: _____

Male / Female

Male / Female

IRD no. _____

(Tax can be deducted from one person only – please indicate preference by ticking)

Parish: _____

Password: _____

Nominated Bank A/C (please provide deposit slip) _____

Tax Rate: (please circle one) 10.5% 17.5% 30% 33% (if not indicated we will assume 17.5% rate)

Number of signatures required (For withdrawals & account closure): **one / two**
(If you do not indicate we will assume that one can sign alone)

CDF Online Services required Yes / No

I / we wish to open (*please tick*)

Term Investment \$ _____ at _____ % p.a. for _____ months
Less interest may be paid if withdrawn prior to maturity.

On Call Savings Account \$ _____

Education Savings Account \$ _____

Christmas Club Account \$ _____ (*Proceeds are available December-February*)

Funeral Savings Account \$ _____

- *No withdrawals are permitted during the account holder's lifetime.*
- *The Funeral Savings Account is opened in one name only – no joint accounts allowed.*
- *Only the Work and Income New Zealand limit (currently \$10,000) is treated as exempt from asset testing for a residential rest home subsidy.*

I / We acknowledge that neither any trustee of the Catholic Development Fund, nor any of its employees or agents (nor any other person on its behalf) is providing any financial service or financial planning service (as such terms are defined in the Financial Advisers Act 2008); for the avoidance of doubt, they have not provided any recommendation, guidance or opinion in connection with any investment in the Catholic Development Fund.

IMPORTANT INFORMATION

This application is issued with the Product Disclosure Statement (PDS) dated 26 November 2016 for an offer of debt securities issued by The Christchurch Catholic Diocesan Development Fund, trading as the Catholic Development Fund (CDF). The PDS and the Trust Deed can be viewed on the following websites: NZ Companies Office www.business.govt.nz/disclose, CDF www.cdf.org.nz or CDF Office at 2/9 Washington Way, Sydenham, Christchurch

Privacy Act

I/We acknowledge that personal information concerning me/us provided to the Catholic Development Fund whether contained in this application or otherwise obtained, may be held and used by the Catholic Development Fund:-

- *To enable any application made to the Catholic Development Fund to be processed and/or accepted*
- *To enable any account or loan to be serviced and maintained*
- *To enable the Catholic Development Fund to provide me/us with information concerning its products and services*

The personal information provided in this application is collected by and will be held by the Catholic Development Fund, Unit 2 / 9 Washington Way, Christchurch.

I/we have the right under the Privacy Act 1993 to obtain access to and to request correction of any personal information held by the Catholic Development Fund concerning me/us

Other Conditions

It is the account holder's responsibility

- *to notify the Catholic Development Fund of any change of address*
- *to advise the Catholic Development Fund immediately if the password becomes known to non-account holders*

Signature(s) _____

Date _____

Please include two certified copies as listed below:

ID Type: Passport Drivers Licence & Eftpos Card Other _____

OFFICE USE ONLY: (*on file*) Identification Confirmed:

Address Confirmed: **Type:** _____

Employee Name: _____

Signature: _____ **Date:** _____