



CATHOLIC DEVELOPMENT FUND

NEW DEPOSITOR DETAILS - PERSONAL

Surname(s)		
Given name(s)		
Title		
Residential Address		
Postal Address (if different)		
Telephone (daytime)		
Telephone (cellphone)		
Email		
Occupation		
Date of Birth	DD / MM / YYYY	DD / MM / YYYY
Gender	Male / Female	Male / Female
IRD Number	<input type="checkbox"/>	<input type="checkbox"/>
(Tax can be deducted from one person only - please indicate preference by ticking <input type="checkbox"/> If IRD number is not provided, tax is deducted at 45%)		
Parish		
Password		
Nominated Bank A/C (please provide deposit slip)	A/C Name:	A/C Number:
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 and account closure; if you do not indicate, we will assume that one can sign alone)	one / two	
CDF Online services required	Yes / No	

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

- Term Investment \$ for months
- 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.

Source of Funds

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 advice, or financial advice service (as such terms are defined in the Financial Markets Conduct Act 2013); 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 22 July 2021 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 2020 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

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: