

How to get started

To get started you need to:

- Read the overleaf. You can contact AFM on 08 83059305 or email us on enquiries@anglicanfundsmangement.com.au.
- Consider the amount and the frequency of your direct debit, complete and sign the Application Form to the right.
- Scan a copy of the Application Form and send the PDF attachment to: enquiries@anglicanfundsmangement.com.au

Once received, the AFM Investor Relations Team will establish your request. Please allow for 7 days for your Direct Debits arrangements to be established, and confirm you have enough money in your account according to the amount and frequency you have selected

Customer Direct Debit Request Service Agreement

Who the agreement is with

This is your Direct Debit Request Service Agreement with Anglican Funds Management (Merchant ID 314011, User ID 383750) ABN 63 198 215 958. It explains what your obligations are when undertaking a Direct Debit arrangement with us. It also details what our obligations are to you as your Direct Debit provider.

How to Contact Us

You can contact us directly or alternatively contact your financial institution. This should be at least 7 working days prior to the next scheduled drawing date. You may contact us as follows:

- P** National 1300 059 305 | Direct 08 8305 9305
- E** enquiries@anglicanfundsmangement.com.au
- M** Anglican Funds Management
18 King William Road
North Adelaide SA, Australia 5006

All communication addressed to us should include your name, parish and contact details.

Definitions

Account means the account held at your financial institution from which we are authorised to arrange for funds to be debited.

Agreement means this Direct Debit Request Service Agreement between you and us.

Banking Day means a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.

Application Form

Office Use Only

Clerk

Account

 CBS PayWay

Please Complete: New Amend Existing

Your Details

Title	Surname
<input type="text"/>	<input type="text"/>
Given Names	
<input type="text"/>	
Phone Number	Mobile
<input type="text"/>	<input type="text"/>
Email	
<input type="text"/>	
Postal Address	
<input type="text"/>	

Schedule

Make this payment:

- | | | |
|--------------------------------------|------------------------------------|--------------------------------------|
| <input type="checkbox"/> Weekly | <input type="checkbox"/> Monthly | <input type="checkbox"/> Half Yearly |
| <input type="checkbox"/> Fortnightly | <input type="checkbox"/> Quarterly | <input type="checkbox"/> Yearly |

Amount	Date of First Payment
<input type="text"/>	<input type="text"/>
Number of Payments	Or <input type="checkbox"/> Continue until further notice
<input type="text"/>	

If the schedule date is not a banking day, the debit will take place on the next banking day. Please allow 7 business days notice for the date of the first payment.

Purpose of Giving

Name of Parish to receive my/our giving

<input type="checkbox"/> General Parish Purposes
<input type="checkbox"/> Building Fund
<input type="checkbox"/> Other (if applicable) <input type="text"/>

Privacy Statement: AFM respects the privacy of all individuals, and supports the Privacy Act and the National Privacy Principles. A copy of our Privacy Statement can be found on our website or by obtaining a copy from our friendly Investor Relations Team on 08 8305 9305.

Transfer Through Direct Debit

Name of Financial Institution

Account Name

Branch

BSB

Account Number

Or **Transfer from a Credit Card**

Card Holder Name

Credit Card Number

Expiry

Visa Mastercard

Or Transfer from an AFM Account

Account Name

Account Number

Authorisation

*I/We confirm that the terms and conditions of the Customer Direct Debit Request Service Agreement have been read and understood.
I/We authorise Anglican Funds Management (Merchant ID 314011, User ID 383750) ABN 63 198 215 958 to debit the nominated account or credit card for the Planned Giving amounts as specified:*

Name of Signatory 1

Signature

Name of Signatory 2

Signature

Please make my/our gift anonymous to my/our nominated Parish.

Debit Day means the day that payment by you to us is due.

Debit Payment means a particular transaction where a debit is made.

Direct Debit Request means the Direct Debit Request between us and you.

us or **we** means Anglican Funds Management, (ABN 63 198 215 958 ARBN 655 122 133, Merchant ID 314011, User ID 383750) you have authorised by requesting a Direct Debit Request.

You means the customer who has signed or authorised by other means the Direct Debit Request.

Your Financial Institution means the financial institution nominated by you on the DDR at which the account is maintained.

Debiting Your Account

By signing a Direct Debit Request or by providing us with a valid instruction, you have authorised us to arrange for funds to be debited from your account. You should refer to the Direct Debit between us and you. We will only arrange for funds to be debited from your account as authorised in the Direct Debit Request. If the debit day falls on a day that is not a banking day, we may direct your financial institution to debit your account on the following banking day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

Amendments by Us

We may vary any details of this agreement or a Direct Debit Request at any time by giving you at least 14 days written notice.

Amendments by You

- You may change, stop or defer a debit payment, or terminate this agreement by providing us with at least 7 days notification by completed scanned form authorizing this to enquiries@anglicanfundsmangement.com.au by contacting us using the details overleaf.
- You may also change, stop or defer a debit payment, or terminate this agreement via arrangement you have with your financial institution.

Your Obligations

It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the Direct Debit Request.

- You may be charged a fee and/or interest by your financial institution.
- You may also incur fees or charges imposed or incurred by us, and
- You must arrange for the debit payment to be made by another

method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

Once established you should check your account statement to verify the amounts debited from your account are correct.

Dispute

If you believe that there has been an error in debiting your account, you should notify us directly on 08 8305 9305 and confirm that notice in writing with us as soon as possible so that we can resolve your query more quickly. Alternatively you can take it up directly with your financial institution.

If we conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.

Accounts

You should check:

- with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions.
- your account details which you have provided to us are correct by checking them against a recent account statement; and
- with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request.

Confidentiality

We will keep any information (including your account details) in your Direct Debit Request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.

We will only disclose information that we have about you:

- to the extent specifically required by law; or
- for the purposes of this agreement (including disclosing information in connection with any query or claim).

Notice

If you wish to adjust this agreement, please feel free to contact us via email on enquiries@anglicanfundsmangement.com.au or by calling our friendly staff on 08 8305 9305.

Parish Planned Giving

**Direct Debit
Request Form**



What is Planned Giving

Planned Giving is an intentional way to show commitment to your regular gift to be deducted automatically from your financial institution, AFM at call account, or credit card, and deposited directly into your parish's account.

There is no need to remember to carry cash, or write a cheque, and while away, you are secure in the knowledge that you are still able to support your parish.

With **Planned Giving** you're in control. All giving is administered by the AFM Investor Relations Team, allowing for the option of anonymity when making payments to your nominated parish of the amount or frequency of your gifts. You can vary the amount, suspend, or cancel at any time by contacting AFM in writing.

Benefits to your parish

As you are giving electronically, there is no need for your parish to collect, count and bank cash. This time saving also ensures money is available to the parish sooner, electronic giving is an efficient way to give, reducing the parish task of dealing with cash transactions.

If there is a special project to complete or ministry to fund, your parish can set up additional planned giving accounts designated for that purpose, together the congregation can achieve that goal.