

Customer number

Membership Application – Deceased Estate

USE THIS FORM TO: Open a membership to hold deceased estate funds prior to finalisation of the estate.

1 ESTATE DETAILS

Estate of the late:

Customer number:

Tax File Number:

Please note: it is not compulsory to provide a Tax File Number or Tax Exemption Code but if not supplied, tax may be deducted from interest earned on the account/s of the estate. Great Southern Bank will apply any TFN or Exemption Code supplied to all accounts under the estate. Refer to Great Southern Bank's Terms & Conditions brochure for further information.

2 PRIMARY ADDRESS FOR CORRESPONDENCE

Address:

Suburb:

State:

Postcode:

Primary contact number:

3 EXECUTOR'S DETAILS

Executor 1: Customer number:

Title: (Mr/Mrs/Ms/Miss/Dr/Other):

Surname:

Given name/s:

Address:

Postal Address (if different):

Home phone:

Work phone:

Mobile:

Preferred phone number:

Home

Work

Mobile

Date of birth:

Email:

Executor 2: Customer number:

Title: (Mr/Mrs/Ms/Miss/Dr/Other):

Surname:

Given name/s:

Address:

Postal Address (if different):

Home phone:

Work phone:

Mobile:

Preferred phone number:

Home

Work

Mobile

Date of birth:

Email:

3 EXECUTOR'S DETAILS - CONTINUED

Executor 3: Customer number:

Title: (Mr/Mrs/Ms/Miss/Dr/Other):

Surname:

Given name/s:

Address:

Postal Address (if different):

Home phone:

Work phone:

Mobile:

Preferred phone number:

Home

Work

Mobile

Date of birth:

Email:

4 ACCOUNTS REQUIRED (Please refer to Great Southern Bank's terms & conditions for details of account types)

Type of account:

Account Number:

Method of Operation:

All parties to sign

Any one to sign

Other (please specify)

Account for a Not-for-Profit association?

Yes

No

Note: Great Southern Bank will require validation of the Not-for-Profit status of the organisation.

Trading Name required for this account?

Yes

No

Trading name:

Note: Use of a Trading Name on an account requires the Trading Name to be registered to the account owner/s. Great Southern Bank will validate Trading Name details via an online search.

Cheque book required?

Yes

No

Note: Cheque Books will be personalised based on the Trading Name and the name/s of the account owners depending on available space. A separate cheque signature card must be completed for forwarding to our processing partners.

Visa Debit Card required?

Yes

No

Note: Visa Debit Cards can only be issued in the names of the signatories. Great Southern Bank cannot produce a card containing the organisation or Trading Name.

Note: Unless specified, Great Southern Bank assume each Administrative Officer may administer the accounts in their own capacity.

5 ADMINISTRATION OF ACCOUNTS

Please elect how the accounts of the Estate are to be administered:

All parties to sign

Any one to sign

Other (please specify)

Note: Great Southern Bank will assume each Executor may administer the accounts in their own capacity (separately) unless otherwise advised.

6 OVERSEAS TAX STATUS

Are any of the Officers, Administrative Officers, Beneficiaries or account signatories a US citizen, US tax resident, or other foreign resident for tax purposes?

If yes, please provide the name of the person/s together with their Social Security Number. (SSN) or Taxation Identity Number (TIN).

US

Other country

None

Name:

SSN/TIN:

Name:

SSN/TIN:

7 PRIVACY NOTICE

In this privacy notice, “we”, “us”, “our” means Credit Union Australia Limited (trading as Great Southern Bank), CUA Management Pty Ltd and Credicorp Insurance Pty Ltd (“Great Southern Bank”).

How we collect your personal information

We collect information directly from you and from third parties. Those third parties are listed below. Every time you apply for a product or service we’ll let you know what information we need and who we will collect it from.

Why we collect your personal information

We use your information to identify you, assess your credit worthiness, set up and manage your membership, accounts and relationship with Great Southern Bank (including related rewards and insurance programs) and to undertake research and development. In many instances, collection of your information is required by law, for example, under the Anti-Money Laundering and Counter Terrorism Financing Act 2006, the Insurance Contracts Act 1984 and the National Consumer Credit Protection Act 2009. Without collecting your information we may not be able to provide you with our products.

We also use your information for other purposes, including keeping you informed about products and services issued or distributed by Great Southern Bank and trusted third parties.

Who we share information with

We may collect and disclose your personal information from and to third parties including:

- Our agents, assignees and contractors
- Our service providers including those used for identity verification, software/IT support, account management (including payments), mailing material to you, member and product research and accounting, legal and audit services
- Your referees, employers and tax agents
- Government agencies when required or authorised by law
- Courts and dispute resolution schemes
- CUA Group entities
- Credit reporting bodies and other credit providers (including second mortgagees)

- Managers and funding providers of securitisation facilities
- Insurers and re-insurers for policies taken out through Great Southern Bank
- Organisations involved in the administration of our rewards programs
- Debt collection agencies, settlement agencies and valuers
- Guarantors and joint-borrowers
- Other organisations with your consent

We also share limited information, such as your email address, with data aggregators and analysts (including social media and virtual community providers). This helps us provide you with more personalised and timely communications. If you’re uncomfortable with this please let us know and we won’t use or share your information in this way.

We may also disclose your personal information to trusted third parties depending on the products or services you want. We’ll tell you who they are when you apply for that product or service, and refer you to their privacy policy. Some of our service providers are located overseas. Our privacy policy lists the countries where they’re located.

Further information

The Great Southern Bank Group Privacy Policy, at www.greatsouthernbank.com.au/privacy-policy or in hard copy on request, includes details about:

- how you can access your information;
- how you can correct information you believe to be inaccurate or incomplete;
- credit reporting including the name and contact details of credit reporting bodies to which we disclose your information, the types of information we disclose and your rights in relation to that information; and
- what to do if you believe that we have breached the Privacy Act, Australian Privacy Principles or the Privacy (Credit Reporting) Code, and how we will handle your complaint.

All privacy queries can be referred to our Privacy Dispute Officer by emailing privacydisputes@gsb.com.au, phoning 133 282, or writing to GPO Box 100, Brisbane QLD 4001.

8 CONDITIONS AND AUTHORISATION (Customer to complete)

- a) If Great Southern Bank requires, I/we agree to become a Great Southern Bank customer and open the account(s) I have applied for.
- b) I/We agree to be bound by the constitution of the credit union, and by Great Southern Bank’s Terms & Conditions brochure.
- c) I/We agree for my/our personal information to be collected, used and disclosed in accordance with Great Southern Bank Group’s privacy policy.
- d) I/We agree to reviewing Great Southern Bank’s Terms and Conditions and Schedule of Fees brochures which are available at greatsouthernbank.com.au.
I/We have been informed that fees & charges apply to accounts and further information has been provided where requested.
- e) I/We agree to registering for Online Banking access (if requested).

f) I/ We consent to electronic delivery of statements and notices. This may include delivery by E-mail, SMS, Online Banking, or sending links or other instructions to access the information. I/We understand that:

- I/We will not receive paper statements and notices
- I/We need to check my/our emails regularly for statements and notices
- I/We can request to receive paper statements and notices at any time via Great Southern Bank Online Banking or by contacting Great Southern Bank on 133 282 or visiting a branch)

Signature	Signature	Signature
Role	Role	Role
Customer number	Customer number	Customer number
Date	Date	Date

Once you have completed this form:



Drop it into a Great Southern Bank branch



Mail it to:
Great Southern Bank
GPO BOX 100, Brisbane QLD 4001

We're here to help

If you need assistance completing this form, call us on **133 282** or drop into your local branch.



Tax File Number or Tax Exemption Code: **Please Note:** it is not compulsory to provide a Tax File Number or Tax Exemption Code but if not supplied, tax may be deducted from interest earned on your account/s. Great Southern Bank will apply any TFN or exemption code supplied to all accounts on which you are an owner. Refer to the Great Southern Bank's Terms & Conditions brochure for further information.