



**Anglican  
Development Fund**



# ADF Online Application Form

*For completion by existing ADF account owners and/or account signatories*

The Anglican Development Fund online facility (ADF Online) is a secure system designed to provide investors with online access to account balances and transaction listings. Parishes and Anglican Organisations are also able to transact on their accounts via the ADF Online service.

## **Key Features of ADF Online**

- Available for use 24 hours, 7 days a week
- View ADF account balances
- View and download transaction histories
- View interest details
- Transfer funds to another ADF account (Parishes and Anglican Organisations only)
- Transfer funds to external financial institutions (Parishes and Anglican Organisations only)
- Bill payments available online via BPAY® (Parishes and Anglican Organisations only)
- Online help page

Please complete this **ADF Online Application Form** in full, and return it together with all supporting documentation to:

The Manager  
Anglican Development Fund  
Reply Paid 70597  
Melbourne Vic 3000  
*(No stamp is required)*

Upon receipt of your application a Password and Membership Number will be issued to you.

© Registered to BPAY Pty Ltd  
ABN 69 079 137 518

[www.adfmelbourne.org.au](http://www.adfmelbourne.org.au)

# Customer Guidelines

## Access to the Service

Access to the Service is granted upon application. We may require you to supply identification as prescribed in the application form should you not have previously done so. This is a requirement of the AML/CTF Act.

ADF will issue you with a Membership Number, and an initial Password. You will be required to change this password on your first successful login to the service. Your level of access to the service will be in line with the combination of the access level granted to you by the account owner (where applicable), and the capabilities and the product features of the account/s you have been granted access to.

For security reasons, access should only be made via clicking on the **ADF Online** menu option on the ADF website: [www.adfmelbourne.org.au](http://www.adfmelbourne.org.au) We reserve the right to modify, enhance, cancel or withdraw the service at any time.

## Applicant Instructions

This Application Form is to be used to register for online access to your ADF account/s. Registration for **ADF Online** is only available to current account owners and/or account signatories. If you are not a current signatory then a separate signing authority must be received by the ADF before your application for online access may be processed. Signatory forms are available upon request from the ADF [Phone: (03) 9653 4220] or may be downloaded from our website at [www.adfmelbourne.org.au](http://www.adfmelbourne.org.au)

Please read the **ADF Online** Terms and Conditions prior to applying for this service. The Terms and Conditions are available from our website, or upon request from the ADF office.

If you are registering for online access to a parish owned account in addition to your own account, please complete a separate application form for each. Please note that, for Parish accounts and accounts held by Anglican organisations, successful registration entitles you to read-only access via **ADF Online**. However, full access to transactional facilities requires two logins.

Please follow the instructions, right, for each part of the Application Form.

## Applicant Information (Individual)

This section of the form is to be completed by those persons wishing to register for online access to an account held by an individual account holder/s.

- Please complete a separate application form for each person who is authorised to operate on your ADF account and who requires access to **ADF Online**.

- This application form does not override the signing authorities currently held by the Anglican Development Fund. Please see **ADF Online** Terms and Conditions for further information.
- Individual account holders are not eligible to transact on their accounts via the ADF Online service. Individual applicants will be provided with View Only access to their nominated account/s. Please see **ADF Online** Terms and Conditions for further information.

## Applicant Information (Parish/Organisation)

This section of the form is to be completed by those persons wishing to register for online access to an account held by a Parish or Anglican organisation.

- Please complete a separate application form for each person who is authorised to operate on your ADF account and who requires access to **ADF Online**.
- This application form does not override the signing authorities currently held by the Anglican Development Fund. Please see **ADF Online** Terms and Conditions for further information.
- Applicants will be required to provide a telephone number (a mobile number is preferred) if applying for full access to accounts owned by Parishes or Anglican organisations. This is in order to receive codes for certain services. Please see **ADF Online** Terms and Conditions for further information.

## ADF Accounts To Be Registered

Please list details of all ADF accounts to which you require online access. In the case of accounts held by Parishes and Anglican Organisations, please also nominate whether you require 'view only' or 'full' access to each account.

## Applicant Identification

This information will be used to verify your identity in the event that you require access to confidential information over the phone or if you forget your Membership Number or Password.

For access to accounts held by Parishes or Anglican organisations, we require the Application Form to be signed by two existing account signatories.

**Additional Documentation:** Please forward to us an original certified copy of one of the following forms of identification in addition to your application:

- Australian Drivers Licence
- Australian Passport
- Birth Certificate or
- Certificate of Australian Citizenship

# Application for access to *ADF Online*

## Applicant Information (Individual)

Title  Given Name/s

Surname

Address

Suburb  State  Postcode

Phone  Fax  Email

## OR Applicant Information (Parish/Organisation)

Parish/Organisation Name

Postal Address

Suburb  State  Postcode

Phone  Fax  Email

**Please provide the following information for each person who is authorised to operate on your ADF accounts. A separate form should be used for each person.**

Title  Given Name/s

Surname  Position in Parish

Address

Suburb  State  Postcode

Phone or Mobile\*  Fax  Email

\* NB: The phone number provided will receive codes for certain services (a mobile number is preferred).

## ADF Accounts To Be Registered

Please list all ADF accounts to which you are requesting access via **ADF Online**.

Account No.	Account Name	View Only or Full Access (required for accounts held by Parishes and Anglican Organisations only)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

## Applicant Identification – (Should we need to identify you over the phone)

Date of Birth  Favourite Colour

Mother's Maiden Name

I confirm that I have read and understood the **ADF Online** Terms and Conditions relating to online access to my/our ADF accounts, and I agree to adhere to the conditions contained in the said document when using the **ADF Online** facility.

<b>Signature of Applicant</b>	<input type="text"/>	Date	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>For Parish/Organisation accounts only</b>	Authorised by	<input type="text"/>	Date	<input type="text"/>	<input type="text"/>
<b>For Parish/Organisation accounts only</b>	Authorised by	<input type="text"/>	Date	<input type="text"/>	<input type="text"/>

### FOR OFFICE USE ONLY

- Please check:
- Application signed and dated
  - Documentation verifying applicant ID has been received
  - Applicant ID has been verified

Membership Number	<input type="text"/>	Issued	<input type="text"/>	<input type="text"/>	<input type="text"/>
Default Password	<input type="text"/>	Issued	<input type="text"/>	<input type="text"/>	<input type="text"/>





## ADF Terms & Conditions

All investments are made with the Melbourne Anglican Trust Corporation (MATC) 209 Flinders Lane, Melbourne, Victoria, 3000 in its capacity as trustee of the charitable trust known as the Anglican Development Fund (ADF). The MATC is also the trustee for the Anglican Diocese of Melbourne.

Investors should be aware that the ADF is not subject to the normal requirement to have a disclosure document or Product Disclosure Statement and be registered or have a trust deed under the *Corporations Act 2001* (Cth). The ADF has not been examined or approved by the Australian Securities & Investments Commission (ASIC).

Further, neither the ADF nor the MATC is prudentially supervised by the Australian Prudential Regulation Authority (APRA) and investments in the ADF are not deposits and do not obtain the benefit of the depositor protection provisions of the *Banking Act 1959* (Cth).

An investment in the ADF is designed for persons who wish to promote the charitable purposes of the Anglican Diocese of Melbourne and for whom the considerations of profit are not of primary relevance to a decision to make an investment in the ADF.

No persons other than the Diocese of Melbourne will receive a material benefit in connection with the promotion of the ADF, the administration or

management of the assets of the ADF or the provision of investment advice in respect of the ADF. However, investment proceeds received by the ADF may be invested in funds managed by the MATC and, as a result, the MATC and other third parties associated with the operations of those funds may indirectly benefit from the payment of fees and expenses out of those funds.

Investments are not secured but repayment is supported by the underlying investments made by the ADF. Please note that the liability of the MATC to investors in the ADF is strictly limited to the assets of the MATC held in its capacity as trustee of the ADF and does not extend to the assets of the MATC held in any other capacity (other than in its capacity as trustee of the Diocese of Melbourne).

The Diocese of Melbourne has guaranteed MATC's obligations to Investors. The Guarantee provided is subject to the terms and conditions of a Deed dated 29 May 2009. The Guarantee can be withdrawn on three months written notice to MATC.

The Diocese of Melbourne underwrites, in accordance with arrangements approved from time to time, the repayment of loans made by the ADF to Diocesan entities.



### Anglican Development Fund

The Anglican Centre  
209 Flinders Lane  
Reply Paid 70597  
Melbourne Vic 3000

Phone (03) 9653 4220  
Fax (03) 9653 4239  
Email [adf@adfmelbourne.org.au](mailto:adf@adfmelbourne.org.au)

[www.adfmelbourne.org.au](http://www.adfmelbourne.org.au)



ANGLICAN DIOCESE OF MELBOURNE