

Member number

Non-personal/Business membership application

1. Membership type (please tick the appropriate classification)

A	B	
<input type="checkbox"/> New <input type="checkbox"/> Change to existing	<input type="checkbox"/> Domestic company <input type="checkbox"/> Registered business name <input type="checkbox"/> ATO regulated Self Managed Superannuation Fund <input type="checkbox"/> Corporate superannuation fund <input type="checkbox"/> Corporate/Family trust	<input type="checkbox"/> Charitable trust <input type="checkbox"/> Incorporated association <input type="checkbox"/> Unincorporated association <input type="checkbox"/> Partnership

 Name of membership
 (See page 6 for correct naming guidelines)

2. Membership eligibility

To be eligible for membership of Nexus Mutual you must fall within the membership bond and at least one owner, director, employee of a company or beneficiary of the trust must already hold a personal membership with the credit union. In the event that the existing personal membership is closed or where the employee of a company ceases to be employed by them Nexus Mutual would require the non-personal/business membership to be closed.

Existing or related member/s Provide details (eg. Member no./Member name)

<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="text"/>
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3. Member name (refer to naming guidelines on page 6)

Registered name	<input type="text"/>
Registered address (PO Box not acceptable)	<input type="text"/>
Postal address	<input type="text"/>
Trading name (if applicable)	<input type="text"/>
ACN or ABN	<input type="text"/>

4. Documents required (please tick the appropriate box and provide the documents listed)

Note: a copy will be made and held by the credit union.

<input type="checkbox"/> Registered business name: Certificate of registration; ABN	<input type="checkbox"/> Domestic company: Certificate of registration; ACN/ABN	<input type="checkbox"/> Corporate/Family trust or registered superannuation fund: Trust deed; Name and address of all trustee/s; Name of each beneficiary; ACN/ABN	<input type="checkbox"/> ATO regulated Self Managed Superannuation Fund: Trust deed; Name and address of all trustee/s; Name of each beneficiary; ACN/ABN
<input type="checkbox"/> Unincorporated/Incorporated associations: Certificate of incorporation; Minutes and/or letter of authorisation; Constitution or copy of rules;	<input type="checkbox"/> Partnerships: Copy of partnership agreement (if exists)	<input type="checkbox"/> Charitable trust: Copy of Australian Taxation Office letter granting tax exemption; Confirmation of status as registered charity	

5. Annual reports

Nexus Mutual's annual report is made available each year at our website nexusmutual.com.au. It contains information on Nexus Mutual's financial position and performance, how efficiently it is being managed and about any financial risks it may face.

6. Authorised signatories & method of operation

	Authorised signatory 1	Authorised signatory 2
Surname		
Given names		
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr
Date of birth		
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Home address (PO Box not acceptable)		
	Pcode	Pcode
Postal address		
	Pcode	Pcode
Work telephone		
Home telephone		
Mobile telephone		
Email address		
Employer/Occupation		
Any existing or related member/s		
	Authorised signatory 3	Authorised signatory 4
Surname		
Given names		
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Dr
Date of birth		
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Home address (PO Box not acceptable)		
	Pcode	Pcode
Postal address		
	Pcode	Pcode
Work telephone		
Home telephone		
Mobile telephone		
Email address		
Employer/Occupation		
Any existing or related member/s		

Method of operation

One may sign
 All must sign
 Other Give details:

7. Proof of identity

Nexus Mutual requires that proof of identity is provided before the membership can be accepted and products and services that you apply for be provided (refer table on the first page for identification documents required). All signatories associated with the membership may also be required to provide personal identification documents even if proof of identity has previously been supplied. Items such as your passport, birth certificate, driver's licence, employment identification cards, student identification cards, credit or debit cards and Medicare card are some examples of the documents that may be required. Nexus Mutual staff will help you with this.

Signatory information which you provide in connection with this application will apply only to accounts nominated by you.

If you are not personally providing your personal identification at a Nexus Mutual branch a 'Certifier' form must be completed and supplied with 'Certified True Copies' of your identification documents. The 'Certifier' form can be obtained from nexusmutual.com.au.

8. Privacy statement, consent and declaration

I/we understand Nexus Mutual will collect information including my full name, date of birth and residential address from me as required by the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth) and that it may take steps to verify the identification information it has collected. I/we consent to the collection, use, handling, disclosure and verification of information as required by the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth). I/we understand that if I/we provide incomplete or inaccurate information that Nexus Mutual may not be able to provide the products or services that I/we are seeking. Other information we ask you to supply on and in connection with this application form is not required by law but we may not be able to grant your application if it is not supplied. The information will not be used or disclosed except for a purpose otherwise disclosed to, or authorised by, you. Subject to the Privacy Act 1988, you may access personal information that we hold about you at any time by asking us.

1. You agree that your personal information may be held and used by us to assess and process this application, maintain a record of your membership, comply with legislative and regulatory requirements, conduct market or customer satisfaction research, develop and identify products and services that may interest you and (unless you ask us not to) provide you with information about other products and services.

2. You agree that we may disclose your personal information to our agents; contractors; external advisers whom we engage from time to time to carry out or advise on our functions and activities; regulatory bodies; government agencies; law enforcement bodies and courts.

3. Notwithstanding anything else in this statement, you may, at any time, advise us that you do not wish to receive any direct marketing communication. You may do this by writing to us at Reply Paid 84350 Melbourne VIC 8060, by telephone on 1300 65 33 28, or by facsimile on +61 3 9608 8305.

I/we do not wish to receive any direct marketing material from Nexus Mutual.

9. Membership declaration

I/we hereby apply for a share in the credit union to become a member of the credit union. I/we understand that on becoming a member I/we agree to the general terms and conditions and I am bound by the credit union's Constitution as governed by the Corporations Law, and as altered from time to time.

I/we submit with this application the full subscription price of \$10 for a share in the credit union. (Share issue does not apply to registered business name memberships).

I/we understand that it is an offence under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 (Cth) to give false and misleading information.

I/we advise that in accordance with a resolution passed at a meeting of our directors/committee/trustees on / / , we the persons whose signature appear on this form are authorised to open a membership and accounts with Nexus Mutual and to nominate the person/s nominated in section 6 who will then have authority to operate the account/s.

I declare all the information contained in this application to be true and correct. I acknowledge that my signature on this application form signifies acceptance of Nexus Mutual's terms and conditions which are available at nexusmutual.com.au or at any Nexus Mutual branch.

Has the applicant for membership or any of the authorised signatories ever been refused accounts at another financial institution?

(please tick ✓)

Yes No

Signature

Authorised signatory 1

Date / /

Authorised signatory 2

Date / /

Authorised signatory 3

Date / /

Authorised signatory 4

Date / /

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10. Account selection (please tick ✓ if you require)

An Access account – your everyday at-call account, will be opened with your membership. Share capital will be deducted from the initial deposit. You can also open the following at-call savings accounts:

Direct Saver (S10)

Bonus Saver (S6)

Cash Management (S9)

11. Card access

Nexus Mutual offers a range of cards to suit your requirements. The Visa Platinum Credit Card gives you all the premium benefits you would expect from Visa as well as up to 46 days interest-free on purchases, and an innovative cash rewards program. It's also conveniently linked to your Access Plus (S1) account so that you avoid cash advance fees when using ATMs and EFTPOS in Australia by selecting the savings or cheque buttons.

Our Visa debit card gives you the flexibility of a credit card to make purchases or withdraw cash while using your own funds.

The rediCARD provides ATM and EFTPOS services to those members who don't want a Visa credit or debit card.

Cards will only be issued in the name of the individual/s who are authorised signatories to the account. A separate form must be completed for each signatory who requires a card (*available online at nexusmutual.com.au*).

12. Remote access

Nexus Mutual's mobile and internet banking facilities allow you to manage your everyday banking electronically at your convenience.

Please complete the separate Internet banking & eStatement application form (also available online at nexusmutual.com.au).

13. Credit union specimen signature card

Each signatory must sign

Account name

Member number

1	2
3	4

New account Variation to existing account

Signing specification

- Anyone may sign
 All parties to sign
 Two to sign
 Other (specify below)



Authority effective from

<input type="text"/>	<input type="text"/>	<input type="text"/>
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14. Your Tax File Number This section (14) is destroyed once your tax file number is recorded on your membership.

Collection of tax file numbers is authorised, and its use and disclosure are strictly regulated, by the tax laws and the Privacy Act. Quotation is not compulsory but tax may be withheld from your interest if you do not quote your tax file number or claim an exemption.

I authorise the application of the information to all accounts and investments in this membership, unless I notify the credit union otherwise.

Exemptions: For details about who is exempt contact the Australian Taxation Office. (Note: an Australian Company Number (ACN) is not acceptable for Tax File Number purposes.)

A business can quote their ABN instead of the tax file number to stop tax being withheld from interest.

Member's Tax File Number

Exemption

<input type="text"/>	<input type="text"/>
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If a TFN is not quoted, withholding tax will be deducted from interest earned if it exceeds the thresholds specified by the ATO.

15. Membership naming guidelines

Type of membership	Correct form	Samples of incorrect form
Domestic company Use the full registered company name including 'Pty Ltd, Ltd,' as appropriate, no abbreviations of name	ABC Pty Ltd	ABC P/L ABC Co.
Registered business name Use the business owners full name followed by the registered trading name	<ul style="list-style-type: none"> • John Citizen T/AS Joe Blogs Plumbing • John & Mary Citizen T/AS Joe Blogs Plumbing • ACME Pty Ltd T/AS Joe Blogs Plumbing 	Citizen Consultants
Self Managed Superannuation Fund Use the name of the trustee (individuals or company) then the name of the superannuation fund	<ul style="list-style-type: none"> • John Citizen ATF John Citizen Superannuation Fund • Acme Pty Ltd ATF John Citizen Superannuation Fund 	Citizen Super Citizen Superannuation Fund
Corporate superannuation fund Use formal name of the superannuation fund	Citizen Superannuation Fund	
Trusts (Formal) Use full name of trustee followed by formal name of trust	<ul style="list-style-type: none"> • John Citizen ATF Citizen Family Trust • ABC Pty Ltd ATF Citizen Family Trust 	Citizen Family Trust
Incorporated associations Use the full name of the association including 'Inc'	Citizen Basketball Club Inc	Citizen Basketball Club
Unincorporated associations Use the name of individual or company followed by the full name of the association	<ul style="list-style-type: none"> • John Citizen FOR Citizen Co Footy Tips • J & M Citizen FOR Citizen Co Footy Tips • J Citizen & F Smith FOR Citizen Co Footy Tips • ACME Pty Ltd FOR Citizen Co Footy Tips 	Citizen Co Footy Tips
Partnership Use the full name of the partnership	John Citizen & Fred Smith Partners	John Citizen & Fred Smith



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