



Catholic Development Fund - Diocese of Broken Bay

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When completed, please scan and email this form to CDF Operations at email address enquiries@sydneycdf.org.au or mail to the above address.

| APPLICATION FOR TERM DEPOSIT (Church Agencies and Clergy) | | | |
|--|---|--|--------------------------|
| Client Name: | | Client No: | |
| Address: | | | Postcode: |
| Telephone: | () | Email: | |
| Amount to Invest (minimum investment \$5,000) | | | |
| \$ | | | |
| <i>[Amount in figures]</i> | | <i>[Amount in words]</i> | |
| Payment Method: | <input type="checkbox"/> Cheque Enclosed | <input type="checkbox"/> Transfer funds from my/our CDF account (as per details below) | |
| | <i>CDF Account No:</i> _____ | <i>Account Name:</i> _____ | |
| Term of Investment: | <input type="text"/> months | OR | To Mature On: / / |
| Interest Rate Applicable: | <input type="text"/> % p.a. | Interest paid at maturity (refer www.cdf.dbb.org.au for rates) | |
| Principal Instructions on Maturity <i>(please tick one of the choices)</i> | | | |
| <input type="checkbox"/> | Rollover for a term of <input type="text"/> months at the then current rate of interest | | |
| <input type="checkbox"/> | Transfer to account | <i>BSB:</i> _____ | <i>Account No:</i> _____ |
| | | <i>Account Name:</i> _____ | |
| <input type="checkbox"/> | Other <i>(please specify)</i> _____ | | |
| Interest Instructions <i>(please tick one of the choices)</i> | | | |
| <input type="checkbox"/> | Compound (reinvest) | | |
| <input type="checkbox"/> | Transfer to account | <i>BSB:</i> _____ | <i>Account No:</i> _____ |
| | | <i>Account Name:</i> _____ | |
| <input type="checkbox"/> | Other <i>(please specify)</i> _____ | | |
| Signed | _____ | Date: | / / |
| <p>Conditions: The Fund undertakes to repay to the depositor (or his/her personal representative) the deposit, being an unsecured deposit note, in full at its maturity date, or to pay or reinvest the deposit as directed by the depositor. A depositor (or his/her personal representative) may in the event of unforeseen circumstances request the Catholic Development Fund – Diocese of Broken Bay (CDF) to repay the deposit in part or in full before its maturity date. In the event of early repayment, interest may be adjusted at a rate as determined by the CDF from time to time.</p> | | | |

Disclosure Statement

The Catholic Development Fund – Diocese of Broken Bay (CDF) is required by law to make the following disclosure. The CDF is not prudentially supervised by the Australian Prudential Regulation Authority nor has it been examined or approved by the Australian Securities and Investments Commission. An investor in the CDF will not receive the benefit of the financial claims scheme or the depositor protection provisions in the *Banking Act 1959* (Cth). Investments in the CDF are intended to be a means for investors to support the charitable, religious and educational works of the Catholic Diocese of Broken Bay and for whom the consideration of profit are not of primary relevance in the investment decision. The investments that the CDF offers are not subject to the usual protections for investors under the *Corporations Act* (Cth) or regulation by Australian Securities and Investments Commission. Investors may be unable to get some or all of their money back when the investor expects or at all and any investment of the CDF are not comparable to investments with banks, finance companies or fund managers. The CDF's identification statement may be viewed at www.dbb.org.au or by contacting the CDF on (02) 9847 0748. The CDF does not hold an Australian Financial Services Licence