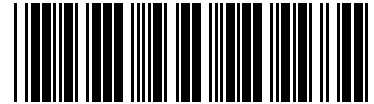


# Change of Bank Account Details Form Pension Products only



Please use this form to update your details for:

- FirstChoice Pension (050)
- FirstChoice Wholesale Pension (051)
- Personal Pension Plan (020)

SAVE FORM

PRINT FORM

Please complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS. Mark appropriate answer boxes with a cross like the following . Start at the left of each answer space and leave a gap between words.

Fields marked with an asterisk (\*) must be completed.

## 1 INVESTOR DETAILS

Account number\* - To avoid processing delays please ensure your account number is clearly marked.

Title

Mr  Mrs  Miss  Ms  Other

Full given name(s)\*

Surname\*

Date of birth\*

## 2 USE THIS SECTION TO UPDATE YOUR BANK ACCOUNT DETAILS

**Please note:** New bank account details cannot be accepted via fax. Please upload your form via FirstNet or send to us by post.

You can only nominate a bank account that is held in your name(s).

I/We authorise Colonial First State Investments Limited (User ID 011802), until further notice in writing to arrange for funds to be debited/credited from my/our account, at the financial institution identified in the schedule below, any amounts which Colonial First State may debit or charge me/us through the Direct Debit System and in accordance with the Bulk Electronic Clearing System (BECS).

By providing bank details in this section you authorise Colonial First State to retain these details for all future transaction requests that you nominate.

Name of Australian financial institution

Branch name or address

Branch number (BSB)

Account number

Account name

Signature of bank account holder

Print name

Date signed

### 3 DECLARATION

I declare that:

- all details in this form are true and correct
- if this form is signed under Power of Attorney, the Attorney declares that they have not received notice of revocation of that power (a certified copy of the Power of Attorney should be submitted with this form unless we have already sighted it)
- I release and indemnify Colonial First State against any liabilities whatsoever arising out of Colonial First State acting on any communications received by phone, fax or other electronic means including without limitation transactions effected through the internet in respect of my investments
- Colonial First State and/or its related entities will not be liable to me or other persons for any loss suffered (including consequential loss) in circumstances where transactions are delayed, blocked, frozen or where Colonial First State refuses to process a transaction or ceases to provide me with a product or service.

I acknowledge that:

- neither Colonial First State, nor any other member of the Commonwealth Bank Group guarantees the repayment of capital or the performance of the funds or any particular rate of return from the funds.

Investments in:

- FirstChoice Pension USI FSF0218AU and FirstChoice Wholesale Pension USI FSF0510AU (referred to as 'FirstChoice' or the fund') are offered from Colonial First State FirstChoice Superannuation Trust ABN 26 458 298 557 by Colonial First State Investments Limited ABN 98 002 348 352 AFS Licence 232468.
- Personal Pension Plan USI FSF0360AU (referred to as 'the fund') is offered from the Colonial First State Rollover and Superannuation Fund ABN 88 854 638 840 by Colonial First State Investments Limited ABN 98 002 348 352 AFS Licence 232468.

Signature of member

Print name

Date signed

If you are signing under a Power of Attorney, please comply with the following:

- attach a certified copy of the Power of Attorney document
- each page of the Power of Attorney document must be certified by a Justice of the Peace, Notary Public or Solicitor. Additional certification options are available from our 'Certification of documents – list of prescribed persons' form at [colonialfirststate.com.au/prospects/FS4523.pdf](http://colonialfirststate.com.au/prospects/FS4523.pdf)
- please also supply a certified copy of the identification documents for the Attorney, containing a sample of their signature, eg Drivers Licence, Passport, etc. The Attorney will also need to complete a power of attorney identification form (to enable us to establish the identity of the Attorney) which can be obtained from our forms library at [colonialfirststate.com.au](http://colonialfirststate.com.au) or by phoning Investor Services on 13 13 36.

Please send the completed form to:

Colonial First State  
Reply Paid 27, Sydney NSW 2001

INTERNAL USE ONLY (COLONIAL FIRST STATE OFFICES AND COMMONWEALTH BANK BRANCHES)

Client identified by (provide the employee name)

Date signed

Signature

CBA Branch/Company stamp (please use black ink only)

# Direct debit customer service agreement

## Our commitment to you

- We will send you regular transaction statements in addition to the initial confirmation of your drawings.
- Where the due date for a drawing falls on a non-business day, we will draw the amount on the next business day.
- We will provide written notice of any proposed changes to your drawing arrangement, providing no less than 14 days notice.
- We may terminate your direct debit arrangement if drawings are returned unpaid, or if debit is unsuccessful three times in any 12-month period.
- We will keep all information provided by you, and details of your nominated account at the financial institution, private and confidential.
- We will investigate and deal promptly with any queries, claims or complaints regarding debits, providing a response within 20 business days.

## Your commitment to us

- It is your responsibility to check with your financial institution prior to completing the direct debit request, that direct debiting is available on that account.
- It is your responsibility to ensure that the authorisation on the direct debit request is identical to the account signing instruction held by the financial institution of the nominated account.
- It is your responsibility to ensure at all times that sufficient funds are available in the nominated account to meet a drawing on the due date for payment.
- It is your responsibility to advise us if the account nominated by you to receive the drawings is altered, transferred or closed.
- It is your responsibility to arrange with us a suitable alternate payment method if the drawing arrangements are stopped either by you or the nominated financial institution.
- It is your responsibility to meet any charges resulting from the use of the direct debit system. This may include fees charged by us as a result of drawings returned unpaid.

## Your rights

- You may request to defer or alter the agreed drawing schedule by giving written notice to us or by calling Investor Services on 13 13 36. Such notice should be received by us at least five business days prior to the due date for the next drawing.
- You may cancel the direct debit arrangement at any time by giving written notice to us or by calling Investor Services on 13 13 36. Such notice should be received by us at least five business days prior to the due date for the next drawing. Your nominated financial institution may also accept a request to cancel your direct debit arrangement with us.
- All transaction disputes, queries and claims should be raised directly with us. We will provide a verbal or written response within 20 business days from the date of the notice. If the claim/dispute is successful, we will reimburse you by way of cheque or electronic credit to your nominated account.

**Please phone Colonial First State Investor Services on 13 13 36 with any questions or send an email to [contactus@colonialfirststate.com.au](mailto:contactus@colonialfirststate.com.au)**