

Direct Debit Planned Giving

Please return this form to the **parish office** or fold and place into the **second collection** bag.

Planned Giving Contribution to my/our parish

New

Alteration

Cancellation

Giver Details

Full Name/s

Address

Telephone

Email

Payment Details

For your **priests and clergy**
(1st collection)

\$

For the support of your **parish**
community (2nd collection)

\$

***Commencement** date
of planned giving

Frequency of planned
giving (if not monthly)

*Payments are processed on the **10th day** each month for bank accounts and **21th day** each month for Visa cards and Mastercards.

Suspend
payment from

Recommence
payment

Please **select** (tick) and complete your **preferred** method of **payment** for planned giving below:

Bank Account to be Debited

(Processed on the **10th** day of every month)

Account Name

BSB

Account Number

Visa or Mastercard to be Debited

(Processed on the **21th** day of every month)

Name on Card

Card Number

Expiry Date

 /

Cardholder details are stored
in line with PCI Security Standards

I/we agree that Catholic Development Fund ID Number 066438 may debit and/or charge any amount through the Bulk Electronic Clearing System (BECS), from the account nominated on this form. Each debit or charge must be effected according to the Service Agreement.

Signature 1

Date

Signature 2 (If Applicable)

Date

Before signing please read the Service Agreement below. Your signature overleaf will indicate you accept the terms of the Service Agreement and confirm that the details on this form have been checked and are correct. If a joint account, please have all account holders sign. If the account is held by a company, please have one director and the company secretary each sign. If you are signing for and on behalf of an entity, please state the capacity in which you sign, in the signature box overleaf.

Direct Debit Request Service Agreement

DEFINITIONS

Account means the account held at your financial institution from which we are authorised to arrange for funds to be debited.

Agreement means this Direct Debit Request Service Agreement between you and us, including the direct debit request.

Business day means a day other than a Saturday or a Sunday or a listed public holiday.

Debit day means the day that payment is due.

Debit payment means a particular transaction where a debit is made, according to your direct debit request.

Direct debit request means the Direct Debit Request between us and you.

Us and we and our means the Catholic Development Fund.

You means the customer(s) who signed the direct debit request. Your financial institution is the financial institution where you hold the account that you have authorised us to arrange to debit.

1. Debiting Your Account

By signing a direct debit request, you have authorised us to arrange for funds to be debited from your account according to the agreement we have with you.

We will only arrange for funds to be debited from your account:

As authorised in the direct debit request; if the debit day falls on a day that is not a business day, we may direct your financial institution to debit your account on the following or previous business day. If you are unsure about which day your account has or will be debited, please check with your financial institution.

2. Changes By You

If you wish to stop or defer a debit payment you must write to us at least 5 business days before the next debit day.

This notice should be given to us in the first instance.

3. Your obligations

It is your responsibility to ensure that there are sufficient clear funds

available in your account to allow a debit payment to be made.

If there are insufficient clear funds available in your account to meet a debit payment:

- you or your account may be charged a fee and/or interest by your financial institution;
- you or your account may be charged a fee to reimburse us for charges we have incurred for the failed transaction;
- you must arrange for the payment to be made by another method

Please check your account statement to verify that the amounts debited from your account are correct.

4. Dispute

If you believe that there has been an error in debiting your account you should call us on **(02) 4222 2444** and confirm the details in writing with us as soon as possible so that we can resolve your query quickly.

5. Accounts

You should check;

- with your financial institution whether direct debiting is available from your accounts offered by financial institutions.
- your account details which you have provided to us are correct by checking them against a recent account statement; and
- with your financial institution before completing the direct debit request if you have any queries about how to complete the direct debit request.

Warning: if the account number you have quoted is incorrect, you may be charged a fee to reimburse our costs in correcting any deductions from:

- an account you do not have authority to operate; or
- an account you do not own.

6. Confidentiality

We will keep any information (including your account details) in your direct debit request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our

employees or agents who have access to information about you, do not make any unauthorised use, modification, reproduction or disclosure of that information. However, we may use your contact details to provide information about the fund. Should you wish this not to be the case, please advise the fund in writing.

CDF Disclosure Statement

CDPF Limited, a company established by the Australian Catholic Bishops Conference, has indemnified the Catholic Development Fund ABN 74 896 491 936 (the Fund) against any liability arising out of a claim by investors in the Fund. In practice, this means your investment is backed by the assets of the Catholic Diocese of Wollongong.

The Catholic Development Fund is required by law to make the following disclosure:

- The Fund 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 Fund will not receive the benefit of the financial claims scheme or the depositor protection provisions in the Banking Act 1959 (Cth).
- Investments in the Fund are intended to be a means for investors to support the charitable, religious and educational works of the Diocese of Wollongong and for whom the consideration of profit is not of primary relevance in the investment decision.
- The investments that the Fund 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 investments of the Fund are not comparable to investments with banks, finance companies or fund managers.

The Fund's identification statement may be viewed at www.cdfwollongong.org.au or by contacting the Fund. The Fund does not hold an Australian Financial Services Licence.