

# Nominated bank account

Please use this form to update your banking details.

Please complete this form using **BLACK INK** and print well within the boxes in **CAPITAL** letters. Fields marked with an asterisk (\*) must be completed. Please note that we are unable to process any requests without the account number, account name and address.

## Section A - Existing investor details

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Account number\*

Account name\* (must be the same as the investor)

Residential address\*

## Section B - New bank account details

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Name of financial institution\*

BSB\*

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Account number\*

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Account name\*

## Section C - Type of authority\*

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Please select one of the options below:

1. Direct credit only     
  2. Direct debit only     
  3. Direct debit and direct credit

By signing this form, you:

### 1. For direct credit authority only

- ▶ authorise us to arrange for funds to be credited to your nominated account as specified in Section B, until further notice in writing is provided by you.
- ▶ will notify us in circumstances where you consider a direct credit is incorrect.

### 2. For direct debit authority only

- ▶ authorise us to accept additional and future direct debit instructions from you.
- ▶ authorise us to arrange for funds to be debited from your nominated account as specified in Section B for the purpose of investing in the products and services selected by you, until further notice in writing is provided by you.
- ▶ agree that funds will at all times be available in your nominated account as specified in Section B, and if any costs and expenses are incurred due to insufficient funds, these costs and expenses will be debited from your nominated account.
- ▶ agree to the terms and conditions of the Direct Debit Agreement in Section E.

### 3. For direct debit and direct credit authority

- ▶ agree to both 1 and 2 above.

## Section D - Declaration

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I/we declare that I/we have provided the correct authority as specified in Section C and I/we agree to the terms and conditions associated with that authority.

Where direct debit applies, I/we declare that I/we have read, understood and agree to be bound by the terms and conditions of the Direct Debit Agreement in Section E and by signing this form I/we acknowledge that I/we are entering into a Direct Debit Agreement with you.

By providing direct debit request instructions including any future instructions, I/we agree that you are not obliged to verify the authenticity of my/our instructions, nor are you responsible for any instructions properly acted on by you.

Signature of bank account holder

Director     Secretary     Sole Director/Secretary

Signature of bank account holder

Director     Secretary

In the case of company signatories, two directors, or a director and company secretary, must sign unless a sole director and sole secretary.

## Section E - Direct Debit Agreement

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### Definitions

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

**Agreement:** this Direct Debit Agreement between you and us.

**Business day:** a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.

**Debit day:** the day that payment by you to us is due.

**Debit payment:** a particular transaction where a debit is made.

**Direct debit request:** the request to debit your account that you make to us.

**We/Us:** OneVue Wealth Services Limited ABN 70 120 380 627.

**You/Your:** the client who signed the direct debit request.

**Your financial institution:** the financial institution where you hold the account that you have authorised us to arrange to debit.

### 1. Debiting your account

1.1 By signing a direct debit request, you have authorised us to arrange for funds to be debited from your account. You should refer to the direct debit request and this agreement for the terms of the arrangement between us and you.

1.2 We will only arrange for funds to be debited from your account as authorised in the direct debit request.

1.3 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 business day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

### 2. Changes by us

2.1 We may vary any details of this agreement or a direct debit request at any time by giving you at least fourteen (14) days' written notice.

### 3. Changes by you

3.1 Subject to 3.2, you may change the arrangements under a direct debit request by giving us at least 14 days written notice in accordance with 8.1.

3.2 If you wish to stop or defer a debit payment or cancel your authority for us to debit your account you must notify us in writing (14) days before the next debit day. This notice should be given to us in the first instance.

### 4. Your obligations

4.1 It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the direct debit request.

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

- (a) you may be charged a fee and/or interest by your financial institution
- (b) you may also incur fees or charges imposed or incurred by us, and
- (c) you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

### 5. Dispute

5.1 If you believe that there has been an error by us in debiting your account, you should notify us directly and confirm that by notice in writing with us as soon as possible so that we can resolve your query more quickly.

5.2 If we conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by:

- (a) arranging for your financial institution to adjust your account (including interest and charges);
- (b) Notifying you in writing of the amount by which your account has been adjusted; and
- (c) providing you with reasons and any evidence for our finding.

5.3 Any queries you may have about an error made in debiting your account should be directed to us in the first instance so that we can attempt to resolve the matter between us and you. If we cannot resolve the matter you can still refer it to your financial institution which will obtain details from you of the disputed transaction and may lodge a claim on your behalf.

### 6. Accounts

You should check:

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

### 7. Confidentiality

7.1 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 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.

7.2 We will only disclose information that we have about you:

- (a) to the extent specifically required by law; or
- (b) for the purposes of this agreement (including disclosing information in connection with any query or claim).

7.3 We will collect, use and disclose any personal information in accordance with our Privacy Policy which is available on request.

### 8. Notice

8.1 If you wish to notify us in writing about anything relating to this agreement, you should write to us at the address provided on the front of this form.

8.2 We will notify you by sending a notice in the ordinary post to the address you have given us in the direct debit request.

Any notice will be deemed to have been received two business days after it is posted.