

Salute Account application.



Defence
Bank

Member to complete this section.

IMPORTANT – This product can only be opened by Australian Defence Force (ADF) members who have (within 12 months) reached one of the below milestones* and have a minimum contribution of \$1,500 monthly deposited into an Everyday Access account. You will need to supply proof of milestone along with this application form prior to opening this account.

Member details.

Member number.

Member name

Tax Residency Declaration.

Are you an Australian resident for taxation purposes?²

Yes. ☐ No. ☐ For taxation purposes

If you selected no for the above question, Australia is not your sole tax residence you must also complete a F601 Foreign Tax Declaration form.

Deposited amount (if applicable).

Amount. \$

Milestones.

Each time you first reach one of the below milestones (within 12 months) you may open a new Salute account.

The *milestones are (please select ONLY one):

☐ Reached 15 years of service in the ADF; or

☐ Retire from the ADF

☐ Reached 25 years of service in the ADF

☐ Resign from the ADF; or

☐ Being deployed

☐ Discharged from the ADF on medical grounds.

☐ Seagoing allowance

A Target Market Determination (TMD) is a document that outlines the target market a product has been designed for. You can view the TMD's on our website at defencebank.com.au

Source of funds.⁴

Please provide where funds will be obtained from.

☐ Salary/ wages. ☐ Govt. benefits. ☐ Family support (gifts/ inheritance). ☐ Business income. ☐ Dividends.
☐ Superannuation. ☐ Other (please specify).

Accessing your accounts.

I/We require the following services to be established.

Remote access.

☐ Online Banking for.

☐ One to sign.

☐ Two to sign (Business Banking).³

1. If the joint account holder is not already a member of Defence Bank, they must complete a separate membership application.
2. The completion of this question is mandatory for all individuals connected to this membership as Defence Bank is required to comply with reporting obligations under the Foreign Account Tax Compliance Act 2010 (FATCA) and Common Reporting Standards (CRS) legislation. If the individual is not an Australian resident for taxation purposes, they must also complete a Foreign Tax Declaration Form.
3. The undersigned request to have access to the account(s) through Business Banking and Two to Sign Banking. Business Banking and Two to Sign Banking allows accounts with 'two to sign' account signing authority to use Online Banking. A transaction can be set up and approved by one member and then approved by another before it is processed ensuring that 'two to sign' authority is being followed.
4. In line with our regulatory obligations, understanding the origin of your deposits and the intended purpose of your Defence Bank membership will help us ensure the integrity and security of your ongoing banking relationship.

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Accessing your accounts cont.

☐ Please communicate with me electronically.

When we communicate with you electronically we will give you electronic, not paper documents. You can always change your preferences and ask that we start sending paper documents again. Please make sure you regularly check to see if we have sent you any documents or information electronically. eCommunication and eStatements not enabled unless Online Banking is active.

Privacy information.

Defence Bank complies with applicable Privacy laws. General information about how we collect, use and disclose personal information about you is set out in our Defence Bank Products and Services - Conditions of Use. Our Privacy Policy provides additional information about how we handle your personal information. Both of these documents can be viewed on our website at defencebank.com.au or are available on request. When you access our website the terms of our Website Privacy Notice also apply. When you apply for a loan product we will ask that you give us various privacy permissions.

☐ I agree to the terms and conditions of the Salute account as detailed in the - Defence Bank Products and Services Conditions of Use.

☐ I have met one of the milestones* named on this form for the first time (within 12 months).

☐ I have read the fees and charges, and the interest rate schedule.

Signature(s).

I/ we wish to open a Salute account.

Member signature.

Joint owner
signature (if applicable).

Date.

 / /

Date.

 / /

Office use only.

Account number.

Document sighted (tick and complete as appropriate).

☐ Reached 15 years of service in the ADF; or

☐ Retire from the ADF

☐ Reached 25 years of service in the ADF

☐ Resign from the ADF; or

☐ Being deployed

☐ Discharged from the ADF on medical grounds.

☐ Seagoing allowance

Identification and form verification check.

Staff name 1.

Staff name 2.

Signature
and date.

 / /

Signature
and date.

 / /

Working alone?

Yes. ☐

No. ☐

Branch name.