

PERSONAL CHANGE OF NAME FORM

Mail to:
PO Box 190, TOOWOOMBA QLD 4350
Phone: 13 14 22 Fax: (07) 4694 9782
E: info@heritage.com.au
www.heritage.com.au



Membership details

Member number/s: _____ Date: _____

Member name: _____

Note: If you have any linked memberships please list these in the member number/s section.

To change the number to sign or the membership mailing address, complete the Amendment Form.

Personal detail changes

Party to whom the change relates

Title: _____ Surname: _____

Given names: _____

Change of name details

New name (write the new name in full as it will appear on the membership in the future)

Title: _____ Surname: _____

Given names: _____

Reason for name change: Marriage Divorce Change of name certificate Correction

Old signature

New signature

Checklist - evidence to support change of name

Evidence of change of name must be provided to, and retained by, Heritage. Below is a listing of the original or certified document that must be provided for each reason to change a name on a membership. Please tick if provided:

- Marriage** – Marriage certificate issued by the Registrar of Births, Deaths and Marriages showing the old name (as it currently appears on membership) and the new name (as it will appear on the membership in the future)
- Divorce** - Marriage certificate issued by the Registrar of Births, Deaths and Marriages showing the old name (as it currently appears on membership) and the new name (as it will appear on the membership in the future)
- Change of name certificate** - issued by the Registrar of Births, Deaths and Marriages showing the old name (as it currently appears on the membership) and the new name (as it will appear on the membership in the future)
- Correction** - one piece of identification with either a photograph or signature which shows the correct spelling of the full name

Account holder / authorised account opener acknowledgement

I/We request Heritage to change my/our personal details to the new details recorded on this form under the membership number specified above I/We declare that I/we am/are one and the same as the person/s with the full name above currently on Heritage's records and further acknowledge that any mortgages or other securities for loans under the relevant membership number will remain in force even though the land, vehicle or other property concerned may not be in my new name.

Party to whom the change relates must sign.

Signature of Account Holder / Authorised Account Opener

Signature of Account Holder / Authorised Account Opener

BRANCH USE ONLY

Have all new Visa cards, Debit cards and cheque books been ordered by the branch upon completion of name change on system?

Y/N

Branch use only	Branch Stamp:	Coded:	Checked:	Verification obtained (Y/N)?:	CSO Signature:	Checking Officer Signature:

NOTE: It is an offence under the Financial Transaction Reports Act 1988 and the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 to give false and misleading information.

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