

# YOUTH MEMBERSHIP APPLICATION FORM

Membership number: \_\_\_\_\_

## Signing Instructions

☐ With parent/guardian as authorised signatory  
(mandatory for children aged 11 and under  
- must complete an Addition of [Party Form](#))

☐ Without parent/guardian as authorised signatory

## Details of Account Holder (Youth)

Title: \_\_\_\_\_ Surname: \_\_\_\_\_

Given names: \_\_\_\_\_ Commonly known as: \_\_\_\_\_

Date of birth: \_\_\_\_\_ Gender: ☐ M ☐ F ☐ Undisclosed

Residential Address of Account Holder (PO Box is not acceptable): \_\_\_\_\_

Mailing Address (if same as residential, write 'as above'): \_\_\_\_\_

Email: \_\_\_\_\_

Phone (Home): \_\_\_\_\_ Mobile: \_\_\_\_\_

### For account holders aged 12 and over only:

First School attended: \_\_\_\_\_ Mother's maiden name: \_\_\_\_\_

## Details of parent/guardian/relative

Title: \_\_\_\_\_ Surname: \_\_\_\_\_

Given names: \_\_\_\_\_ Date of birth: \_\_\_\_\_

Identification document and number: \_\_\_\_\_ Expiry date: \_\_\_\_\_

Residential Address of Account Holder (PO Box is not acceptable): \_\_\_\_\_

Phone (Home): \_\_\_\_\_ Mobile: \_\_\_\_\_

Email: \_\_\_\_\_ Relationship: \_\_\_\_\_

## Tax File Number (TFN)

Individuals under 16 years of age are generally exempt from quoting a TFN (thresholds apply - refer to the Australian Taxation Office for details).

☐ Account holder does not have a TFN and is exempt

You can provide your tax file number directly to your local branch or phone 13 14 22. Whilst it is not compulsory to provide a tax file number, we recommend that it is supplied. If a tax file number is not provided, Heritage is required by law to deduct withholding tax from any interest earned above a certain threshold.

## Foreign Tax residency certification

Are you, for Tax purposes, a resident of any country other than Australia? ☐ No ☐ Yes

If YES, please complete the below "Common Reporting Standard details: Resident of a foreign country" section to complete your application.

## CRS-details: Resident of a foreign country

	Country / Jurisdiction of Tax residence	If no TIN available, select reason: A The country/jurisdiction where the Account Holder is resident does not issue TINs B Unable to provide to the bank due to the law by country/ Jurisdiction of tax residence C Unable to obtain a TIN or equivalent (please state reason why)
1		<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
2		<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C
3		<input type="checkbox"/> A <input type="checkbox"/> B <input type="checkbox"/> C

If more than 3 countries are selected, please call our Contact Centre on 13 14 22

## Declaration, Authorities and Acknowledgement

**This section is to be completed by the parent/guardian and account holders aged 12 to 17**

By signing this Membership Application Form, I/we agree to the following:

- I/we apply for membership in Heritage and People's Choice Limited ("Heritage") and for one \$2.00 member share in Heritage to be issued to me. I/we agree that whilst Heritage does not require payment of the \$2.00 issue price for the member share as part of this application, and does not currently intend to call for payment of the issue price in future, I/we will be required to pay the \$2.00 issue price if called upon to do so in future in accordance with Heritage's constitution. I/we agree that I/we will be issued one member share only, regardless of the number of accounts held by me with Heritage, and that my name will be entered in the Heritage register of members.
- I/we agree to be bound by the Heritage and People's Choice Limited Constitution.
- To be bound by the terms and conditions as outlined in the Guide to Heritage Deposit Products.
- That it is an offence under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006 to make a false and misleading statement. I/we declare that the details as shown on this form are complete and accurate.
- For my personal information to be collected, used and disclosed in accordance with Heritage's Privacy Policy. This includes verification of personal information as required by the Anti-Money Laundering and Counter-Terrorism Financing Act 2006.
- That any tax file number submitted will apply to all existing and future accounts opened under this membership.
- The signing instructions on this membership application apply to all accounts and term deposits under the member number attached to this application and will remain in force until Heritage receives notice in writing of cancellation, which is signed in accordance with the signing instructions.

☐ I understand that I may indicate that I do not want the account holder to receive marketing information (including newsletters) from Heritage Bank by ticking this box.

☐ Heritage may use my electronic or telephone details to communicate with me regarding details about my account. Heritage may also send me required documents in an email. I understand that in these instances paper copy will not be sent. I should check my emails regularly and I can withdraw this consent at any time. If I change my personal details (for example address or email address), I will inform Heritage as soon as possible. If you do not wish to receive emails from Heritage in relation to your account please tick here.

### Foreign Country Tax Information Declaration

I/we declare:

- that the information provided in this form is correct and reflects my/our tax residency status;
- that I/we will update Heritage promptly if my/our tax residency status is to change in the future.

I/we acknowledge that the information contained in this form and information regarding the Account Holder(s) and any Reportable Account(s) may be provided to the Australian Taxation Office and exchanged with tax authorities of another country/jurisdiction or countries/jurisdictions in which the Account Holder(s) may be tax resident pursuant to intergovernmental agreements to exchange financial account information.

Signature of parent/guardian: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of account holder (aged 12 and over): \_\_\_\_\_ Date: \_\_\_\_\_

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