

# AMENDMENT FORM – FARM MANAGEMENT DEPOSIT (FMD) ACCOUNT INSTRUCTIONS

# Heritage Bank

## Account details

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

Membership name: \_\_\_\_\_

Deposit number: \_\_\_\_\_ Date of deposit: \_\_\_\_\_

## Please select the options below you would like to change

### 1. Transfer deposit to another Heritage account

☐ To nominated linked account

**Note:** This instruction will cause your Farm Management Deposit account to lose its "Farm Management status". Therefore, you will no longer be eligible for the taxation benefits associated with this account. Before proceeding, you should obtain specific tax and financial advice on your position from your registered tax adviser.

☐ To At-Call FMD account

☐ To fixed term      New term length      ☐ 12 months      ☐ 24 months

### 2. Change of nominated linked account

**Note:** Simply Access (S1), Mortgage Crusher (S10), Business Cheque (S13), Pension Plus (S65), Cash Management Account (S8 no longer available for sale), Loan Offset (S9 no longer available for sale), and Money Manager (S24 no longer available for sale) accounts are eligible to be a linked account.

New account type: \_\_\_\_\_

Account number (if different from above): \_\_\_\_\_

## Instructions for Farm Management Deposit account fixed term reinvestment only

### 3. Alter interest payment frequency instructions to

☐ Quarterly      ☐ Annually

### 4. Deposit instructions - reinvestment change of term. The applicable rate of interest for the new term selected will apply.

☐ 12 months      ☐ 24 months

## Authorisation

\_\_\_\_\_  
Member Signature

\_\_\_\_\_  
Date

## Return details

Please return to the address below or visit your local branch:

Heritage Bank  
Operations Support Department - Farm Management  
Reply Paid 190  
Toowoomba QLD 4350  
(no stamp required if posted in Australia)

If you have any questions or would like further information:

Email: [info@heritage.com.au](mailto:info@heritage.com.au)  
Phone: 13 14 22  
Website: [www.heritage.com.au](http://www.heritage.com.au)

## Branch use only

Signature verified

Processed by

Verified by