

Your personal details

What is your name?

Mr Mrs Miss Ms

FIRST

LAST NAME

What is your home address?

POST CODE

Are you employed?

Yes, full time Yes, part time Yes, self employed
 Yes, casual No, unemployed

What is your occupation?

Tick here if you do not wish to receive emails from First Credit Union about our products or promotions.

What is your date of birth?

/ /

How many dependant children do you have?

What is your postal address? (if different)

POST CODE

What are your phone numbers and email address?

HOME [] MOBILE []

WORK []

EMAIL

What would you like your account password to be?

This will be used to identify you for telephone enquiries. Your password can be 1-8 characters long. This password should NOT be the same as your internet or phone banking passwords.

Have you or your joint applicant ever been declared Bankrupt, No Asset Procedure (NAP) or gone through a Debt Repayment Order (DRO, formally a Summary Instalment Order)?

Yes No If yes, in what year? / /

AEOI Self Certification - Main Account Holder

What is your IRD number?

What is your Tax Rate?**

10.5% (income \$0-\$14,000) 30% (income \$48,000-\$69,000)
 17.5% (income \$14,000-\$48,000) 33% (income \$70,000+)

Are you a tax resident in another country (other than NZ)?

No, if no continue to next section
 Yes, if yes please provide countries of Tax residency and TIN (Tax Information Number)

Please list all countries other than New Zealand in which you are a tax resident and provide the TIN for each country

| Country | Tax Information Number (TIN) | Reason if no TIN |
|---------|------------------------------|--|
| | | <input type="radio"/> TIN not issued by this country <input type="radio"/> Country has not issued a TIN to me |
| | | <input type="radio"/> TIN not issued by this country <input type="radio"/> Country has not issued a TIN to me |

2. Joint Applicant / Authority to Operate

Add Remove
 Joint Applicant Authority to Operate

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How would you like the authorised signatories to sign?

Individually (this means that either can sign for withdrawals and account maintenance*)
 Jointly (this means that both must sign for withdrawals and account maintenance*)

***Both members must sign for account closure**

AEOI Self Certification - Joint Account Holder/ ATO

What is your IRD number?

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

What is your Tax Rate?*

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 17.5% (income \$14,000-\$48,000) 33% (income \$70,000+)

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| <input type="text"/> | <input type="text"/> | <input type="radio"/> TIN not issued by this country <input type="radio"/> Country has not issued a TIN to me |
| <input type="text"/> | <input type="text"/> | <input type="radio"/> TIN not issued by this country <input type="radio"/> Country has not issued a TIN to me |

Products

I/We would like to apply for:

- Internet Banking** **Mobile Banking** **Loan Provider Account**

Loan Provider Account Information

The S6 Loan Provider account is a great way to help our members save. Credit Unions are all about encouraging thrift and the Loan Provider is great, because staff will help members to stick to the 14 day notice of withdrawal condition.

- The account is frozen and requires a 14 day notice of withdrawal, helping you resist the temptation to transfer funds easily to other accounts.
- Should you request an immediate withdrawal there is an early withdrawal fee of \$20.
- If you have a loan this account is frozen until the loan is repaid in full.
- It helps you build a savings history with us, which will help with future loan applications.
- You will be helping other members by contributing to the loan pool.

Declaration

I/We hereby make application for membership of First Credit Union and agree to abide by the rules of First Credit Union as may be amended from time to time.

1. I/We declare that the information provided in this application is true and correct.
2. I/We understand that my/our signature(s) and photograph(s) will be scanned and held by First Credit Union for identification purposes.
3. I/We have received the First Credit Union Terms and Conditions and agree to abide by these.
4. I/We understand that for First Credit Union to comply with its AML/CFT obligations I/we agree to our identification, full name, address and date of birth to be verified through a third party such as CloudCheck Verify.
5. I/We understand that First Credit Union will meet its Privacy obligations in the collection, use and storage of all my/our personal information.
6. I/We have fully completed the AEOI section to the best of our knowledge.
7. I/We understand that I/we have the right of access to, and correction of, all personal information held by First Credit Union that relates to me/us.
8. I/We will not disclose my passwords to any unauthorised party.
9. I/ We understand that costs may apply to the products I have applied for.
10. I/We understand all correspondence, including statements will be sent to me/us via email. I/We understand that we can change this instruction at any time by advising First Credit Union.
11. I/We will advise First Credit Union of any changes to my email address or if I wish to change my statement instructions.
12. This authorisation is given in consideration (among other things) that the remaining account holder will take over any outstanding debt to First Credit Union, originally taken out in joint names. I/we hereby acknowledge that I/we have been advised by First Credit Union to take independent legal advice prior to signing this authority and I/we waive the requirements for such advice. I/we advise that there is no pressure imposed upon me by First Credit Union in signing this authority.

Main Applicant's Signature

Today's Date

Joint Applicant/ ATO Signature

Today's Date