



APPLICATION FORM

Catholic Diocese of Auckland
Pompallier Centre, 30 New St,
Private Bag 47-904,
Ponsonby, Auckland
Phone: 09 360-3009 Fax: 09 376-2829
Email: cdf@cda.org.nz

I wish to open a Funeral Savings Account

Personal Details:

Surname: _____

First Names: _____

Address: _____

Telephone No: Home () _____ Work: () _____

Email: _____

IRD Number

Tax Rate: (please circle one) 12.5% 21% 33% 38% (if not indicated we will assume lowest rate)

Interest is calculated at the current on-call rate of ___%

Password: _____

Alternative Contact Details (next of kin/trustee/solicitor etc):

Name: _____

Address: _____

Telephone: _____

I authorise the CDF on proof of my death to pay the proceeds of my Funeral Savings Account to: _____

**Please attach photo ID*

Deposit:

I enclose the sum of \$ _____ (made payable to **RC Bishop of Auckland – CDF Account**)

Automatic Payments: Payments can be made by automatic payment

If you wish to make automatic payments, please tick the box
(we will send the form for you to complete & lodge with your bank)

Please turn over

TERMS & CONDITIONS

Withdrawals:

No withdrawals are permitted during the lifetime of the Account Holder.

Disbursement of Account Monies

Upon Death: Monies from an account will be paid out to meet funeral costs of the deceased on the written instructions of the Account Holder's solicitor or such other person that the Account Holder may direct. Any shortfall between Account balance and funeral costs will be met by the deceased's estate. Any surplus, will remain in the deceased's estate.

Interest:

Interest is calculated on a daily basis from the date deposits are received. It is credited to the Account each 31 December or on Account closure. Resident Withholding Tax will be deducted.

Interest Rate:

The Interest rate is the current CDF 'on-call' rate and is subject to change.

Fees:

There are **NO FEES** charged against the Funeral Savings Account.

Statements:

A statement showing the up-to-date position of the Funeral Savings Account will be sent to the Account Holder (at the Account Holder's last know address) at 30 June and 31 December each year, and when requested on demand.

Payments:

Contributions to the Funeral Savings Account can be made by single or casual lump sums or by bank automatic payments. There is no minimum deposit required.

Asset-testing Exemption:

As per current government policy Funeral Savings Accounts up to \$10,000 (including interest) will not form part of an Account Holder's assets for asset testing purposes, or effect an Account Holder's entitlement to the government's residential care subsidy. Account balances over \$10,000 (including interest) may be liable to asset testing under current government policy.

Privacy:

The CDF will ensure that the information about the Account Holder is held secure and will not be disclosed to any other person except for the purpose authorised by the Account Holder, and authorised by law.

Other Conditions:

It is the account holder's responsibility to notify the Catholic Development Fund of any change of address or personal details.

Signature _____

Date _____

** Please attach copy of photo identification i.e. drivers licence/passport*

<u>Office use Only</u>	<u>Initials</u>
Opening deposit received	_____
Receipt/Certificate issued	_____
A/c information loaded/opened	_____