

# Direct Saver Auto Savings Plan Form



St.George Bank – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL and Australian credit licence 233714.

Send to St.George, Locked Bag 1, Kogarah NSW 1485 Fax: (02) 9995 8158

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

## STEP 1. Account Details

Please complete both boxes below or at least one where both are not known.

Internet / Phone Banking Access Card Number

\_\_\_\_\_

New Auto Savings Plan Request

Direct Saver Account Number

\_\_\_\_\_

Amended Instructions

Cancellation

## STEP 2. Applicant 1 (A/C Owner)

Full Name *(include title and first and second names)*

\_\_\_\_\_

Home Address *(include State and Postcode. If non-resident, state overseas address. PO Box not accepted)*

\_\_\_\_\_

Home Telephone

( ) \_\_\_\_\_

Business Telephone

( ) \_\_\_\_\_

Email Address

\_\_\_\_\_

Password

\_\_\_\_\_

## Applicant 2 (A/C Owner)

Full Name *(include title and first and second names)*

\_\_\_\_\_

Home Address *(include State and Postcode. If non-resident, state overseas address. PO Box not accepted)*

\_\_\_\_\_

Home Telephone

( ) \_\_\_\_\_

Business Telephone

( ) \_\_\_\_\_

Email Address

\_\_\_\_\_

Password

\_\_\_\_\_

## STEP 3. New Auto Savings Plan

If you would like a fixed amount automatically transferred into your Direct Saver account from your Linked everyday banking Account on a regular basis, please complete details below:

Account Holder(s) Name(s)

\_\_\_\_\_

BSB Number

\_\_\_\_\_

Linked Account Number

\_\_\_\_\_

Weekly

Fortnightly

Monthly

Amount

\$ \_\_\_\_\_

Start Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Please allow 7 working days to commence and ensure you have sufficient funds in your Linked Account.

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## STEP 4. Amended Auto Savings Plan

Type of amendment  Frequency  Amount  Date  Debit Details

### Existing Auto Savings Plan Details

Account Holder(s) Name(s)

BSB Number

Nominated Account Number

Weekly  Fortnightly  Monthly Amount \$  Start Date  /  /

Note: Auto Savings Plan transfers can only be arranged from your Linked Account.

If you are amending your Debit Details, you authorise St.George Bank – A Division of Westpac Banking Corporation ABN 33 007 457 141 – Debit User Number 162608, the Debit User, to debit your Linked Account, detailed above, with any amount, through the Direct Debit System in accordance with the terms and conditions set out in Part C of the Direct Saver Terms and Conditions booklet, a copy of which has been given to you previously. You acknowledge that a copy can be obtained from our web site at [stgeorge.com.au](http://stgeorge.com.au) or by calling 13 33 30. By signing this form you confirm that those terms continue to be in force.

Please allow 7 working days and ensure you have sufficient funds in your Linked Account.

## STEP 5. Request To Cancel Auto Savings Plan

I wish to cancel my Auto Savings Plan from my Linked account to my Direct Saver account. (Must be signed in accordance with the Authority held on the account to be debited.)

## STEP 6. Authority

In accordance with the Direct Saver account terms and conditions, I/we direct and authorise St.George to act on the instructions I/we give above. St.George may continue to act on the instructions until St.George receives written notice of my death or bankruptcy or that I/we cancel the authority or St.George cancels the authority. I/We have read and understood the Privacy Statement below and I/we consent to and authorise the collection, maintenance, use and disclosure of personal information in accordance with the Privacy Statement. Where I/we have provided information about another individual, I/we declare that the individual has been made aware of that fact and the contents of the Privacy Statement.

Signature 1\*

X

Signature 2\*

X

## Office Use Only

• \*No. of signatures required in accordance with authority for this Account

• Customers signatures verified

• Checked By:

Name

Employee No.

## Privacy Statement

### Personal information

We collect personal information from you to process your application, provide you with your product or service, and manage your product or service. We may also use your information to comply with legislative or regulatory requirements in any jurisdiction, prevent fraud, crime or other activity that may cause harm in relation to our products or services and help us run our business. We may also use your information to tell you about products or services we think may interest you.

If you do not provide all the information we request, we may need to reject your application or we may no longer be able to provide a product or service to you.

We may disclose your personal information to other members of the Westpac Group, anyone we engage to do something on our behalf and other organisations that assist us with our business.

We may disclose your personal information to an entity which is located outside Australia. Details of the countries where the overseas recipients are likely to be located are in our privacy policy.

As a provider of financial services, we have obligations to disclose some personal information to government agencies and regulators in Australia, and in some cases offshore. We are not able to ensure that foreign government agencies or regulators will comply with Australian privacy laws, although they may have their own privacy laws. By using our products or services, you consent to these disclosures.

We are required or authorised to collect personal information from you by certain laws. Details of these laws are in our privacy policy.

Our privacy policy is available at [stgeorge.com.au](http://stgeorge.com.au) or by calling 13 33 30. It covers:

- how you can access the personal information we hold about you and ask for it to be corrected;
- how you may complain about a breach of the Australian Privacy Principles or a registered privacy code and how we will deal with your complaint;
- how we collect, hold, use and disclose your personal information in more detail.

We will update our privacy policy from time to time.

### Other acknowledgments and consents

- We may confirm the details of the information provided in this application which includes contacting your employer to confirm salary, address or other personal details.
- Where you have provided information about another individual, you must make them aware of that fact and the contents of the Privacy Statement.
- This application form is not an offer or acceptance of credit.

### Information about products and services

We will use your personal information to contact you or send you information about other products and services offered by the Westpac Group or its preferred suppliers.

### Definitions

“We”, “our”, “us” means St.George Bank - A Division of Westpac Banking Corporation ABN 33 007 457 141.

“Westpac Group” means Westpac Banking Corporation and its related bodies corporate.