

Supporting the mission, education,  
and charitable works of the South  
Australian Anglican community

### Anglican Funds South Australia

18 King William Road  
North Adelaide SA 5006

Phone 08 8305 9305

Email enquiries@anglicanfundssa.com.au

[www.anglicanfundssa.com.au](http://www.anglicanfundssa.com.au)

Parish Stamp



An activity of the Synod of the Diocese of Adelaide of the  
Anglican Church of Australia Inc.

ABN 63 198 215 958



## PARISH PLANNED GIVING

Direct Debit Request Form

planned giving

## COMMITMENT • CARING • CONVENIENCE

### What is Planned Giving?

Planned Giving is a caring way to show commitment to your parish by arranging for your regular gift to be deducted automatically from your financial institution, AFSA at-call account, or credit card, and deposited directly into your parish's account.

There is no need to remember to carry cash, or write a cheque, and while away, you are secure in the knowledge that you are still able to support your parish.

With Planned Giving you are in control. You can choose to give anonymously. You can vary the amount, suspend, or cancel at any time by contacting AFSA in writing.

### Benefits to your parish

Your parish can plan with confidence for the future, knowing it can rely on your regular support. It saves time as there is less cash to count each week, and handling smaller cash amounts makes banking safer for those involved.

If there is a special project to complete or ministry to fund, your parish can set up additional planned giving accounts specifically for that purpose, and together the congregation can achieve that goal.

### How to get started

To get started you need to:

- Read the *Customer Direct Debit Request Service Agreement* overleaf. You can contact AFSA on 08 8305 9305 to discuss any questions.
- Plan how much you would like to give and complete the attached form.
- Return the form to us at the address shown on the back of this brochure.

It is that easy, just let the friendly staff at AFSA make all the arrangements for you.

## PLANNED GIVING APPLICATION FORM

Please Complete:

New  Amend Existing

### YOUR DETAILS

Title  Surname

Given Names

Phone Number  Mobile

Email

Postal Address

### SCHEDULE

Make this payment:

Weekly  Fortnightly  Monthly  Quarterly  Half Yearly  Yearly

Amount \$

Date of First Payment

Number of Payments  OR  Continue until further notice

If the scheduled date is not a banking day, the debit will take place on the next banking day. Please allow 7 business days notice for the Date of First Payment.

### PURPOSE OF GIVING

Name of Parish to receive my/our giving

FOR  General Parish Purposes

OR  Building Fund

OR  Other (if applicable)

### OFFICE USE ONLY

Clerk  Account   Phoenix  PayWay

Please turn over to complete your application.

## TRANSFER THROUGH DIRECT DEBIT

Name of Financial Institution

Account Name

Branch

BSB

Account Number

## OR TRANSFER FROM A CREDIT CARD

Cardholder Name

Credit Card Number

Expiry

Visa Card

MasterCard

## OR TRANSFER FROM AN AFSA ACCOUNT

Account Name

Account Number

## AUTHORISATION

I/We confirm that the terms and conditions of the *Customer Direct Debit Request Service Agreement* have been read and understood.

I/We authorise Anglican Funds South Australia (Merchant ID 314011, User ID 383750) ABN 63 198 215 958 to debit the nominated account or credit card for the Planned Giving amounts as specified overleaf.

Please make my/our gift anonymously

Name of Signatory 1

Signature

Name of Signatory 2

Signature

**Privacy statement:** AFSA respects the privacy of all individuals, and supports the Privacy Act and the National Privacy Principles. A copy of our Privacy Statement can be found on our website or obtained by contacting AFSA directly.

## Customer Direct Debit Request Service Agreement

This is your Direct Debit Request Service Agreement with Anglican Funds South Australia (Merchant ID 314011, User ID 383750) ABN 63 198 215 958. It explains what your obligations are when undertaking a Direct Debit arrangement with us. It also details what our obligations are to you as your Direct Debit provider.

Please keep this agreement for future reference. It forms part of the terms and conditions of your Direct Debit Request (DDR) and should be read in conjunction with your DDR authorisation.

### How to Contact Us

You can contact us directly or alternatively contact your financial institution. This should at least 7 working days prior to the next scheduled drawing date. You may contact us as follows:

Phone: 08 8305 9305  
Email: enquiries@anglicanfundssa.com.au  
Mail: Anglican Funds South Australia  
18 King William Road  
North Adelaide, SA, Australia 5006

All communication addressed to us should include your name, parish and contact details.

### Definitions

**account** means the account held at your financial institution from which we are authorised to arrange for funds to be debited.

**agreement** means this Direct Debit Request Service Agreement between you and us.

**banking day** means a day other than a Saturday or a Sunday or a public holiday listed throughout Australia.

**debit day** means the day that payment by you to us is due.

**debit payment** means a particular transaction where a debit is made.

**direct debit request** means the Direct Debit Request between us and you.

**us** or **we** means Anglican Funds South Australia, (Merchant ID 314011, User ID 383750) you have authorised by requesting a Direct Debit Request.

**you** means the customer who has signed or authorised by other means the Direct Debit Request.

**your financial institution** means the financial institution nominated by you on the DDR at which the account is maintained.

### Debiting Your Account

By signing a Direct Debit Request or by providing us with a valid instruction, you have authorised us to arrange for funds to be debited from your account. You should refer to the Direct Debit

Request and this agreement for the terms of the arrangement between us and you.

We will only arrange for funds to be debited from your account as authorised in the Direct Debit Request.

If the debit day falls on a day that is not a banking day, we may direct your financial institution to debit your account on the following banking day. If you are unsure about which day your account has or will be debited you should ask your financial institution.

### Amendments by Us

We may vary any details of this agreement or a Direct Debit Request at any time by giving you at least 14 days written notice.

### Amendments by You

You may change, stop or defer a debit payment, or terminate this agreement by providing us with at least 7 days notification by writing to:

Anglican Funds South Australia  
18 King William Road  
North Adelaide, SA, Australia 5006

or by telephoning us on 08 8305 9305 during business hours;

or arranging it through your financial institution, which is required to act promptly on your instructions.

### Your Obligations

It is your responsibility to ensure that there are sufficient clear funds available in your account to allow a debit payment to be made in accordance with the Direct Debit Request. If there are insufficient clear funds in your account to meet a debit payment:

- you may be charged a fee and/or interest by your financial institution;
- you may also incur fees or charges imposed or incurred by us; and
- you must arrange for the debit payment to be made by another method or arrange for sufficient clear funds to be in your account by an agreed time so that we can process the debit payment.

You should check your account statement to verify that the amounts debited from your account are correct.

### Dispute

If you believe that there has been an error in debiting your account, you should notify us directly on 08 8305 9305 and confirm that notice in writing with us as soon as possible so that we can resolve your query more quickly. Alternatively you can take it up directly with your financial institution.

If we conclude as a result of our investigations that your account has been incorrectly debited we will respond to your query by arranging for your financial institution to adjust your account (including interest and charges) accordingly. We will also notify you in writing of the amount by which your account has been adjusted.

If we conclude as a result of our investigations that your account has not been incorrectly debited we will respond to your query by providing you with reasons and any evidence for this finding in writing.

### Accounts

You should check:

- with your financial institution whether direct debiting is available from your account as direct debiting is not available on all accounts offered by financial institutions.
- your account details which you have provided to us are correct by checking them against a recent account statement; and
- with your financial institution before completing the Direct Debit Request if you have any queries about how to complete the Direct Debit Request.

### Confidentiality

We will keep any information (including your account details) in your Direct Debit Request confidential. We will make reasonable efforts to keep any such information that we have about you secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.

We will only disclose information that we have about you:

- to the extent specifically required by law; or
- for the purposes of this agreement (including disclosing information in connection with any query or claim).

### Notice

If you wish to notify us in writing about anything relating to this agreement, you should write to:

Anglican Funds South Australia  
18 King William Road  
North Adelaide, SA, Australia 5006

We will notify you by sending a notice in the ordinary post to the address you have given us in the Direct Debit Request. Any notice will be deemed to have been received on the third banking day after posting.