



# savings accelerator application

To open your ING DIRECT Savings Accelerator please: • use CAPITAL letters • mark boxes with an ✕ where applicable • use black pen. Please read the Savings Accelerator Terms & Conditions (T&Cs), available at [ingdirect.com.au](http://ingdirect.com.au) or by calling 133 464 and consider whether the product is appropriate for you before making any decision in relation to it. Please ensure you provide the appropriate supporting documentation to verify your identity.



## Step 1 Your details

SAPDF

### Applicant 1

ING DIRECT Client Number (if existing client)

Mr  Mrs  Ms  Other

First name  Middle initial

Surname / Family name

### Residential address (must be completed. PO Box not accepted)

Unit number  Street number

Street name

Suburb

State  Postcode

### Mailing address (if same as above, please mark this box with an ✕ )

Unit number  Street number

Street name (or PO Box)

Suburb

State  Postcode

### Previous residential address (if you have been at your current address for less than 3 years)

Unit number  Street number

Street name

Suburb

State  Postcode

### Optional section

Tax File Number (TFN) or Exemption

If not supplied, we may deduct tax from interest earned at the highest marginal tax rate plus the Medicare levy.

### Applicant 2

ING DIRECT Client Number (if existing client)

Mr  Mrs  Ms  Other

First name  Middle initial

Surname / Family name

### Residential address (if same as Applicant 1, please mark this box with an ✕ )

Unit number  Street number

Street name

Suburb

State  Postcode

### Mailing address (if same as above, please mark this box with an ✕ )

Unit number  Street number

Street name (or PO Box)

Suburb

State  Postcode

### Previous residential address (if you have been at your current address for less than 3 years)

Unit number  Street number

Street name

Suburb

State  Postcode

### Optional section

Tax File Number (TFN) or Exemption

If not supplied, we may deduct tax from interest earned at the highest marginal tax rate plus the Medicare levy.

## Applicant 1

Driver's Licence (if applicable)

**Contact details** (you must provide at least one phone number)

Mobile phone number

Other phone number (for landline, please provide area code)

Email

## Applicant 2

Driver's Licence (if applicable)

**Contact details** (you must provide at least one phone number)

Mobile phone number

Other phone number (for landline, please provide area code)

Email

## Online statements and account information

If you provide an email address, you may nominate to receive statements and account information from us electronically. Statements will be provided every 3 months and if you opt to receive online statements, you will be notified by email when they are available. Note that if you choose to receive online statements you will no longer be sent hard copy statements in the mail. We may also send email notifications about product updates and other important information relating to your account. You can change your nomination or your email address at any time by notifying ING DIRECT.

I agree to receive electronic online statements and account information

I agree to receive electronic online statements and account information

## Mandatory security details

Date of birth (DD/MM/YYYY)

Mother's maiden name (mother's original surname / family name)

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Date of birth (DD/MM/YYYY)

Mother's maiden name (mother's original surname / family name)

## Step 2 Your opening deposit

Please select how you wish to make your opening deposit. **Note:** The combined total deposits in all your Savings Accelerator account(s) should not exceed \$5 million, whether in joint or individual names.

**A. By electronic transfer** – Your opening deposit will be transferred from the linked bank account nominated in Step 3. Your opening deposit will be requested from your linked bank account on the day your Savings Accelerator is opened (provided we are able to verify your bank account). If the transfer is from an external bank account, the Debit Authority and Declaration box in Step 6 must also be selected.

\$

OR

**B. By cheque** – The cheque must be drawn on the external bank account nominated in Step 3. Your cheque must be **made payable to the account holder(s) or to ING DIRECT**.

\$

Cheque deposits are not permitted for your opening deposit when linking to an ING DIRECT account.

## Step 3 Your linked bank account

You must link an eligible ING DIRECT account OR an external Australian bank account (must be in the same name(s) as the applicant(s) in Step 1), to your new Savings Accelerator. **Note:** If linking to an eligible ING DIRECT account, just write: • **Name of bank:** "ING DIRECT" • **Suburb:** "Sydney"

• **BSB:** "923100" • **Account Number:** your ING DIRECT account number (not your Client Number - your account number can be found on your statement of account) • **Account Holder's name on linked bank account:** the name(s) on your ING DIRECT account.

Name of bank

Suburb of bank

BSB number (mandatory)

Account number (mandatory)

Account Holder's name on linked bank account (mandatory - must be the same name(s) as the applicant(s) in Step 1)

If you have nominated an eligible ING DIRECT account, you authorise and request ING DIRECT, a division of ING Bank (Australia) Limited ABN 24 000 893 292, to transfer money from the ING DIRECT account nominated above to your Savings Accelerator as instructed by you or any other amounts as instructed or authorised to debit in accordance with the Savings Accelerator Terms and Conditions.

## Step 4 Automatic Savings Plan (optional)

Please complete this section if you would like a fixed amount automatically transferred from your linked bank account into your Savings Accelerator on a regular basis. **Note:** If your linked bank account is an external bank account, the Debit Authority and Declaration box in Step 6 must be selected.

Yes, I would like to set up an Automatic Savings Plan (ASP) commencing on:  /  /  (Your ASP can only commence once your account has been opened and activated.)

Weekly  Fortnightly  Monthly  Amount \$

## Step 5 Naming your Savings Accelerator (optional)

You can give your Savings Accelerator a name. Please mark one (  ) or write your own name:

Holiday  Home deposit  Car  Retirement  Education  Gifts/Christmas  Other

## Step 6 Debit Authority and Declaration

**External Bank Account - Direct Debit Request:** By marking the box below with an  and [signing this application form](#), I/we authorise and request ING DIRECT, a division of ING Bank (Australia) Limited ABN 24 000 893 292 (User ID 123079) to draw money from the **External Bank Account** nominated in Step 3, through the Bulk Electronic Clearing Systems, as instructed by me/us or any other amounts as instructed or authorised to debit in accordance with the Savings Accelerator Terms and Conditions. I/we understand that this direct debit arrangement is governed by the Direct Debit Request Service Agreement and the Savings Accelerator Terms and Conditions.

### Declaration (to be completed by each Applicant)

I/we have read and agree to be bound by the Savings Accelerator T&Cs, which incorporate the Privacy Statement and the Direct Debit Request Service Agreement.

#### Signature of Applicant 1

Date (DD/MM/YY)

#### Signature of Applicant 2 (if applicable)

Date (DD/MM/YY)

For a joint Savings Accelerator, both applicants must sign.

**Adviser use only** - Company name

Adviser name

Adviser number

**Adviser** - Please provide a copy of records identifying your client(s), if they are not existing ING DIRECT client(s) ..... ► Go to Step 8

## Step 7 Supporting identification document

If you are linking to an eligible ING DIRECT account you do not need to complete this section ..... ► Go to Step 8

If you are linking to an external bank account, you need to provide a supporting identification document with your application. Please supply one of the following. **Note: You must provide an original bank statement for us to request your opening deposit by electronic transfer.**

**A.** An **original** bank statement (less than 6 months old) for your nominated external bank account showing your full name and current residential address..... ► Go to Step 8

**OR**

**B.** A certified copy of the identification document ..... ► Refer Appendix A (on page 4 of this application form) for how to do this. (Not required if you are an existing ING DIRECT customer. Go to Step 8).

## Step 8 What to do when you have completed this form

When you have completed and signed the application form, please send it with your supporting identification document to us at:

ING DIRECT  
Reply Paid 2682  
Sydney NSW 2001 (no stamp required)

As part of the application process, your identity must be verified. If you are not able to provide an original bank statement, you must complete this section to send us an original certified copy of a document which verifies your identity. You must complete all steps in this section. If the application is for a joint account, each applicant will need to provide an identification document (they may have a different certifier).

<b>Step A. Choose identification documents</b>	<b>Step B. Select a certifier</b>
<p><b>You need to choose 1 document from the following list</b> Please note that documents will not be returned.</p> <p><b>Certified copy document</b></p> <ul style="list-style-type: none"> <li>■ Australian Driver's Licence (must be current, shows current residential address and photograph)</li> <li>■ Birth Certificate or Birth Extract (issued by a State or Territory in Australia)</li> <li>■ Proof of Age Card / NSW Photo Card (must be current and show date of birth and photograph)</li> <li>■ Pension Card (must be current and issued by Centrelink entitling financial benefits)</li> <li>■ Australian Tax Office Tax Assessment Notice (issued in the last 12 months and shows current residential address)</li> <li>■ Australian Passport (either a current passport or a passport that expired within the last 2 years)</li> <li>■ International Passport (current, containing a photo and signature and accompanied by translation by a Professional Translator accredited by the National Accreditation Authority for Translators and Interpreters if not in English)</li> </ul> <p style="text-align: center;"><b>THE IDENTIFICATION DOCUMENT PROVIDED MUST DISPLAY YOUR FULL NAME.</b></p>	<p>Take the original and copy of your identification document to a document certifier from the list below. Ask them to follow the instructions in Step C.</p> <ul style="list-style-type: none"> <li>■ A Justice of the Peace</li> <li>■ A Bank Officer with 2 or more years continuous service</li> <li>■ An Accountant who is a member of the Australian Institute of Chartered Accountants, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership.</li> <li>■ A Solicitor or Barrister</li> <li>■ A Judge</li> <li>■ A Police Officer</li> <li>■ An agent in charge of, or a permanent employee (with 2 or more years of continuous service) of an Australia Post outlet</li> <li>■ An officer with, or authorised representative of, a holder of an Australian Financial Services Licence, having 2 or more continuous years of service with one or more licensees.</li> </ul> <p>Note: We are not able to accept doctors, pharmacists or members of the Defence Force as document certifiers. A complete list of ING DIRECT acceptable document certifiers is available on <a href="http://ingdirect.com.au">ingdirect.com.au</a> in the FAQ section.</p>

**Step C. Document certifier to complete**

To certify the copy of the identification document to be a true copy of the original document, on the copied document complete the following:

1. Write these words: "I hereby certify this document is a true copy of the original document shown to me on [date]"
2. Sign the copy document
3. Provide Name and Certifier Classification (as per Step B). For example; John Smith, Accountant

**Then complete the following section**

I have examined the identification document of the person(s) listed in Step 1.

If ING DIRECT has any questions regarding this verification, you may contact me at the details provided below (this may be your work or residential contact details).

**Document certifier 1**

First name	Middle initial	
<input style="width: 95%;" type="text"/>	<input style="width: 20px;" type="text"/>	<input style="width: 95%;" type="text"/>
Surname / Family name		
<input style="width: 100%;" type="text"/>		
Primary phone number		
<input style="width: 100%;" type="text"/>		
Unit number	Street number	
<input style="width: 50%;" type="text"/>	<input style="width: 95%;" type="text"/>	
Street name		
<input style="width: 100%;" type="text"/>		
Suburb		
<input style="width: 100%;" type="text"/>		
State	Postcode	
<input style="width: 30%;" type="text"/>	<input style="width: 60%;" type="text"/>	
Certifier classification (as per Step B)		
<input style="width: 100%;" type="text"/>		
Signature of certifier 1	Date (DD/MM/YY)	
<input style="width: 95%;" type="text"/>	<input style="width: 50%; text-align: center; font-size: 1.2em; font-family: monospace;"/> / /	

**Document certifier 2 (if applicable)**

First name	Middle initial	
<input style="width: 95%;" type="text"/>	<input style="width: 20px;" type="text"/>	<input style="width: 95%;" type="text"/>
Surname / Family name		
<input style="width: 100%;" type="text"/>		
Primary phone number		
<input style="width: 100%;" type="text"/>		
Unit number	Street number	
<input style="width: 50%;" type="text"/>	<input style="width: 95%;" type="text"/>	
Street name		
<input style="width: 100%;" type="text"/>		
Suburb		
<input style="width: 100%;" type="text"/>		
State	Postcode	
<input style="width: 30%;" type="text"/>	<input style="width: 60%;" type="text"/>	
Certifier classification (as per Step B)		
<input style="width: 100%;" type="text"/>		
Signature of certifier 2	Date (DD/MM/YY)	
<input style="width: 95%;" type="text"/>	<input style="width: 50%; text-align: center; font-size: 1.2em; font-family: monospace;"/> / /	

**Note:** It is an offence under the Anti-Money Laundering / Counter-Terrorism Financing Act 2006 to provide a false or misleading statement, produce a false or misleading document, to receive an ING DIRECT product in a false name or to fail to disclose any other name or names you are commonly known by.