

Single to joint account conversion

Complete this form to convert an existing single account(s) to a joint account(s). Both applicants must be existing shareholding members.

What are your personal details?

Existing single account holder

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Miss	Other	<input type="text"/>	Member no.	<input type="text"/>
Given names							Last name	
Home phone			Work phone			Mobile phone		
Email								

What does the existing single account holder wish to do?

I, the existing single account holder, wish to convert the following account(s) under member number to joint status.

- Everyday account with Visa Debit card access* **OR** Everyday Direct account with Visa Debit card access*
- Bill Paying account Reward Saver account Summer Stash account
- Online savings account Cash Management account

Signature	<input type="text"/>	Date	<input type="text"/>
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*The Bank reserves the right not to issue a card at its discretion.

New joint account holder

Title	<input type="checkbox"/> Mr	<input type="checkbox"/> Mrs	<input type="checkbox"/> Ms	<input type="checkbox"/> Miss	Other	<input type="text"/>	Member no.	<input type="text"/>
Given names							Last name	
Home phone			Work phone			Mobile phone		
Email								

Does the new joint account holder wish to receive a separate monthly statement? Yes No

Signing authorisation

- Either to sign Both to sign



What is your Tax File Number or exemption?

Collection of tax file numbers is authorised and its use and disclosure are strictly regulated by the tax laws and Privacy Act and, it is not an offence if you choose not to quote your tax file number. If you don't quote your tax file number, or claim an exemption, tax may be taken out of your interest or dividends. For more information about the use of tax file numbers, please go to ato.gov.au.

First holder	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	OR	Exemption (specify type)	<input type="text"/>
Tax File Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
Second holder	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	OR	Exemption (specify type)	<input type="text"/>
Tax File Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			

Please sign below in black pen only

- ▶ If this is an Everyday or Everyday Direct account with an offset facility then change of ownership may require the Bank to cancel the offset facility.
- ▶ Each joint account holder is individually liable for the full amount owing on the joint account.
- ▶ Where a card or cheque book is issued on this account all parties to the account will be liable for any withdrawals or purchases made with the card or cheque book on that account.
- ▶ Accounts with RediCredit or with a credit balance (loan accounts) cannot be converted to joint accounts unless an application for credit in joint names is approved.
- ▶ If the account is 'either to sign', either joint account holder can cancel this arrangement at any time.
- ▶ Refer to the Fees and Charges brochure for details on fees and charges.

Existing single account holder

Signature

Date

New joint account holder

Signature

Date

Office use only

Member no	<input type="text"/>
Operator no	<input type="text"/>
Date actioned	<input type="text"/>
Sig verified by	<input type="text"/>

Returning this form



Teachers Mutual Bank Limited, Reply Paid 7501, Silverwater NSW 2128

Faxed or scanned documents cannot be accepted