

Accelerator Cash Account and Term Deposit Form Acceptance Guide

Please use this guide when completing Accelerator Cash Account (ACA) and Term Deposit (TD) application and account maintenance forms. Forms can be accessed from the adviser section of www.commsecadviserservices.com.au

OPENING AN ACCELERATOR CASH ACCOUNT OR TERM DEPOSIT

FORM NAME	SIGNATURES REQUIRED	FORM ACCEPTED VIA:		
		FAX	SCAN AND EMAIL	POST
Existing Commonwealth Bank Customers				
ACA & TD Application Form	Client Only	✓	✓	✓
TD Application Form	Client or Adviser*	✓	✓	✓
New to bank Customers				
ACA & TD Application Form (Customer Identified using an FSC/FPA form)	Client Only	✓	✓	✓
ACA & TD Application Form (Customer Identified using Certified Copies of Identification)	Client Only	X	X	✓ Original form required
Transaction and Maintenance Requests				
Transfer Request Form <i>From the ACA to a Commonwealth Bank or other financial institution account in the same name or third party</i>	Client or Adviser*	✓	✓	✓
Transfer Request Form <i>Transfer from another Commonwealth Bank account in the same name to the ACA</i>	Client Only	✓	✓	✓
Periodic Payment Authority	Client or Adviser*	✓	✓	✓
Change of Company Details Form	Client Only	✓	✓	✓
Change of Company Directors Form	Client Only	X	X	✓ Original form required
Change of Personal Contact Details	Client Only	✓	✓	✓
Adviser Authority to Operate	Client or Adviser*	✓	✓	✓
Change of Personal Name Form	Client Only	X	X	✓ Original form required
Account Closure Request Form (ACA)	Client only	✓	✓	✓
Account Closure Request Form (TD)	Client or Adviser*	✓	✓	✓
Security Lodgement Form	Client Only	✓	✓	✓
Certified Copies of ID Form	Client or Adviser*	X	X	✓ Original form required
Wholesale Client Form <i>(including, where required, CERTIFIED copies of the supporting documentation)</i>	Client Only	✓	✓	✓ Original form required

* The adviser may sign on behalf of the client provided the client has given the adviser an Authority to Operate.

For More Information

Please contact your CommSec Adviser Services Business Development Manager or state team.

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