

## Southgate Meal Entertainment Card Application Form

EMPLOYEE DETAILS			
<b>Title</b>		<b>Date of Birth</b>	
<b>Given Name</b>		<b>Surname</b>	
<b>Employer</b>			
NOTE: It is an ANZ requirement that <u>each cardholder</u> provides a <u>valid email address</u> with their card application.			
<b>Primary Cardholder's Email</b>			
<b>Additional Cardholder's Email</b>			

AMOUNT TO BE SALARY PACKAGED
Please nominate the amount you wish to salary package towards the Meal Entertainment Card <u>each paycycle</u> .
<b>Amount Per Paycycle \$</b> _____

PROCEDURE CHECKLIST		
<b>1</b>	<b>Identify yourself with ANZ – See attached document</b> (if not a current ANZ Bank customer)	<input type="checkbox"/>
<b>2</b>	<b>Complete the attached 'ANZ Salary Packaging Cardholder Application Form'</b> <ul style="list-style-type: none"> <li>Ensure the SECURITY CODE field is completed for yourself and any additional cardholder.</li> <li>Confirm the ANZ identity verification method used by each cardholder (in relevant section).</li> </ul> <p style="color: red; font-size: small;">WARNING: Failure to identify all cardholders with ANZ prior to submitting this form to Southgate can result in your card funds being frozen until the ANZ identification procedures are completed.</p>	<input type="checkbox"/>
<b>3</b>	<b>Complete this form and return all of the above documents directly to Southgate</b>	<input type="checkbox"/>

EMPLOYEE DECLARATION			
<p>I declare that I have read, understood and agree to Southgate's <i>Terms and Conditions</i> of provision and usage of the <i>Southgate Salary Packaging Payment Cards</i> under the <i>Southgate Expense Payment Card Program</i> and the <i>Southgate Meal Entertainment Program</i> as applicable. Southgate retains the right to vary these <i>Terms and Conditions</i> at any time, as updated on our website under your secure employee login web portal.</p> <p>I declare that the information provided on this <i>Application Form</i> is true and correct.</p> <p>I declare that I will not claim a tax deduction on my annual income tax return for <u>any</u> expenses paid using a <i>Southgate Salary Packaging Payment Card</i>, and I will meet the cost of any Fringe Benefits Tax liability that arises as a result of using the <i>Southgate Salary Packaging Payment Cards</i>.</p>			
<b>Employee Name</b>			
<b>Signature</b>		<b>Date</b>	

Please return this form along with the **ANZ Salary Packaging Cardholder Application Form** to:

Southgate Salary Packaging Services  
 PO Box 183  
 South Melbourne VIC 3205

OR

Fax: 1300 500 150

# Don't forget to identify yourself with ANZ prior to submitting your application.



**Visit an ANZ branch** and provide two forms of identification before applying for your card. For example, in your wallet you may currently be carrying:

- An Australian Drivers Licence
- A Proof of Age Card
- An Australian Bank Credit or Debit Card
- A Medicare Card

**All primary and secondary cardholders will need to be identified by ANZ.**



For your nearest ANZ branch visit [www.locate.anz.com/anz/australia](http://www.locate.anz.com/anz/australia)

**Once you have been identified by ANZ, you should submit your Salary Packaging or Meal Entertainment card application form to your provider for processing.**

Below is a list of documents that you can provide when visiting an ANZ branch.



**You can provide any of the following combination of documents:**

The Customer Identification Process requires only two identification documents, but in a limited number of combinations. If an identification document is in a different name to that recorded in the Key Details, a linking document will also be required, e.g. a marriage certificate that links the married name in the Key Details to the maiden name on a driver licence.

- Two category A
- One category A and one category B
- One category A and one category C
- One category A and one category D
- One category B and one category C

Category A	Category B	Category C	Category D
<b>Government-issued photographic ID</b>	<b>Government-issued non-photographic ID</b>	<b>Evidence of Address</b>	<b>Other ID</b>
<ul style="list-style-type: none"> <li>• Australian Passport (current or expired less than 2 years) or Foreign Passport</li> <li>• Australian Drivers Licence or Learner Permit</li> <li>• One of the following other photo ID:                             <ul style="list-style-type: none"> <li>- Proof of Age Card</li> <li>- Army, Navy or Air Force ID</li> <li>- Department of Defence ID</li> <li>- Police ID</li> <li>- Government issued Foreign ID</li> <li>- Firearms / Shooting Licence</li> <li>- Explosives Licence</li> <li>- Waterways / Boat Licence</li> </ul> </li> </ul> <p>It is not acceptable to produce two forms of the same ID type e.g. an Australian passport and a British passport, or drivers licence and a learners permit or foreign drivers licence</p>	<ul style="list-style-type: none"> <li>• Birth Certificate</li> <li>• Australian Citizenship Certificate</li> <li>• Foreign Citizenship Certificate (translated into English if required, by a translator accredited by the National Accreditation Authority for Translators and Interpreters (NAATI))</li> <li>• One of the following Centrelink Pension Cards:                             <ul style="list-style-type: none"> <li>- Health Care Card</li> <li>- Commonwealth Seniors Health Card</li> <li>- Pensioner Concession Card</li> </ul> </li> <li>• Interim Concession Card</li> <li>• Foreign Drivers Licence (must not be expired)</li> </ul>	<ul style="list-style-type: none"> <li>• Tax Assessment Notice issued by ATO (less than 12 months old)</li> <li>• Utility Bill (less than 3 months old)</li> <li>• Government Benefits Notice (less than 12 months old)</li> <li>• School Attendance Letter (less than 3 months old)</li> <li>• Registered Aged Care Facility Letter (less than 3 months old)</li> <li>• Rates Notice (less than 3 months old)</li> </ul>	<ul style="list-style-type: none"> <li>• Other Australian Bank Passbook</li> <li>• Other Australian Bank Credit Card</li> <li>• Other Australian Bank Debit Card</li> <li>• Medicare Card</li> <li>• Financial Institution Bank Statements (less than 3 months) – this must be a bank statement issued by:                             <ul style="list-style-type: none"> <li>- Members of the Australian Bankers Association</li> <li>- Australian-owned banks that are regulated by APRA</li> </ul> </li> <li>• Australian Tertiary Institution Student Card</li> </ul>

**Acceptable linking documents (if identification document is in a different name to that recorded in Customer key details)**

- Marriage Certificate
- Certificate of Divorce (must show married name as maiden name)
- Court Order
- Adoption Papers
- Birth Certificate with Endorsement
- Change of Name Certificate (Deed Poll)

**Any Questions? Call ANZ Salary Packaging on 1800 614 741. M-F 8am-8pm AEDST.**



# Salary Packaging Cardholder Application Form



Please complete Parts 1 - 6 and then return this form to your Salary Packaging Provider.

## 1. CARD TYPE & AMOUNT

Please select Primary and/or Additional Card.

Primary Card     Additional Card     Both Primary and Additional Cards

Please select the type of Salary Packaging Card you require. If a Primary Card, nominate the amount you wish to salary package per pay cycle\*:

Meal Entertainment Card    If Primary, the amount to be deducted per salary cycle    \$   

\*Your pay cycle is determined by your employer. The nominated amount will be deducted from your pre-tax salary by your employer and will be made available on your Salary Packaging Card. If you wish to change the nominated amount you will need to arrange this change with your employer. ANZ is not responsible for and accepts no liability for, your salary deduction arrangements with your employer. Any questions or concerns regarding your salary deductions or the nominated amount must be referred to your employer.

## 2. PRIMARY CARDHOLDER EMPLOYER DETAILS

Employer     Site/Campus

### If applying for an Additional Card

Primary Cardholder full name

## 3. PRIMARY CARDHOLDER DETAILS

\*All fields mandatory

Title     First Name     Middle Name (if any)     Surname

Employee ID     Salary Packaging Provider Reference/ID (if different)

Date of Birth (DD/MM/YYYY)

**Security Code** - You need to choose an identification password to be used to identify yourself over the **phone** or for **online set up**. This can be a combination of numbers or letters.

Phone Number     Mobile     Email Address

Residential Address     Suburb/town     State     Postcode

Postal Address (if different from above)     Suburb/town     State     Postcode

If you are an existing ANZ customer your account details **must match the above**. If you need to update ANZ for your existing account details, please do so via:

- Log on to ANZ Internet Banking and select 'Update Details'
- Call 13 13 14; or
- Visit an ANZ Branch

## 4. ADDITIONAL CARDHOLDER DETAILS

Title     First Name     Middle Name (if any)     Surname

Primary Cardholder's Employee ID     Salary Packaging Provider Reference/ID (if different)

Date of Birth (DD/MM/YYYY)

**Security Code** - For over the **phone** identification only. This can be a combination of numbers or letters.

Residential Address     Suburb/town     State     Postcode



## 5. IDENTIFICATION (KNOW YOUR CUSTOMER) VERIFICATION

It is a legislative requirement that cardholders complete an identity verification check before the card is activated. If you do not currently hold a valid identification record with ANZ, you will need to complete identification and verification (NB: cardholders who hold other ANZ products and have been identified previously may not be required to be identified again. The address you were previously identified with ANZ must be the same as your current address that you have detailed on this form).

You must have a valid identification record with ANZ before your card will be activated.

The easiest way to do this is by visiting an ANZ Branch with the identification documentation outlined in the accompanying flyer.

**PLEASE ENSURE YOU HAVE COMPLETED IDENTIFICATION PRIOR TO SUBMITTING THIS APPLICATION. YOUR CARD WILL NOT BE ACTIVATED UNTIL YOUR IDENTITY HAS BEEN SUCCESSFULLY VERIFIED BY ANZ.**

**ALL CARDHOLDERS (BOTH PRIMARY AND SECONDARY) WILL NEED TO COMPLETE IDENTIFICATION.**

Please advise which of the following is applicable:

Primary Cardholder      Additional Cardholder

                    

I am an existing ANZ customer for a product other than Salary Packaging. (NB: By ticking this box you may still be required to be re-identified by ANZ, subject to existing account and identification status. Account details with ANZ must be the same as the details listed on this form)

                    

I have been to an ANZ Branch for the purposes of an identity verification check

                    

I have been identified by ANZ through other means (E.g. certified documents)

## 6. ACCOUNT AUTHORITY

If a Primary Card, by use of the Card, I accept that I will be liable to ANZ for any credit extended arising out of the use of the Card, including the use of the Card by an Additional Cardholder, and agree to all applicable terms and conditions included within ANZ Commercial Card Terms and Conditions for the ANZ Salary Packaging Card or ANZ Meal Entertainment Card which can be viewed at [anz.com/aus/ratefee/default.asp?section=SBS](http://anz.com/aus/ratefee/default.asp?section=SBS)

I declare that the details contained on this application form are true and correct and request that ANZ issue the card to me. I acknowledge that additional rules may be imposed by my salary packaging provider regarding the use of this card and a copy of these rules have been made available to me. I hereby declare to abide by such rules and variations which are made by salary packaging provider from time to time. Also, I have read and understood (and agree to) the declaration below.

Primary Cardholder Signature (Mandatory)

Date (DD/MM/YYYY)

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Print Name

If an Additional Card, by use of the Card, I agree to all applicable terms and conditions included within ANZ Commercial Card Terms and Conditions for the ANZ Salary Packaging Card or ANZ Meal Entertainment Card which can be viewed at [anz.com/aus/ratefee/default.asp?section=SBS](http://anz.com/aus/ratefee/default.asp?section=SBS)

I declare that the details contained on this application form are true and correct and request that ANZ issue the card to me. I acknowledge that additional rules may be imposed by my salary packaging provider regarding the use of this card and a copy of these rules have been made available to me. I hereby declare to abide by such rules and variations which are made by salary packaging provider from time to time. Also, I have read and understood (and agree to) the declaration below.

Additional Cardholder Signature

Date (DD/MM/YYYY)

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Print Name

## 7. DECLARATION

### ANZ's collection, use and disclosure of personal information

Australia and New Zealand Banking Group Limited ABN 11 005 357 522 (ANZ) is collecting the Cardholder's information in order to provide the Cardholder with the ANZ Salary Packaging Card and for the purposes described in the product terms and conditions. Without this information, ANZ will not be able to provide the Cardholder with the Card.

By signing this Salary Packaging Cardholder Application Form, the Cardholder acknowledges and agrees that ANZ may disclose your information (which may include information about your credit history and credit worthiness obtained from a credit reporting body) to:

- any agent, contractor or service provider ANZ engages to carry out or assist its functions and activities, including the salary packaging service provider;
- an organisation that assists ANZ to identify, prevent or investigate any fraud, unlawful activity or misconduct (or suspected fraud, unlawful activity or misconduct);
- any related entity of ANZ;
- any third party providing you with a product or service in relation to the ANZ product; and
- the Cardholder's Employer

ANZ may disclose information to recipients (including service providers and related entities) which are (1) located outside Australia and/or (2) not established in or do not carry on business in Australia. You can find details about the location of these recipients in ANZ's Privacy Policy and at [www.anz.com/privacy](http://www.anz.com/privacy).

### Privacy Policy

ANZ's Privacy Policy ([www.anz.com/privacy](http://www.anz.com/privacy)) also contains information about:

- any laws that require or authorise ANZ to collect certain information from you;
- how to access your information and seek correction of your information; and
- how you can raise concerns that ANZ has breached the Privacy Act or an applicable Code and how ANZ will deal with these matters

### Further information

Your product terms and conditions booklet and our ANZ Privacy Policy contain further information about our handling of the information we collect during the course of your relationship with ANZ. If you have provided information about someone else, please show them a copy of this clause so that they may understand how ANZ may use and disclose their information.

### ANZ is the issuer of the Salary Packaging Card

Your employer or salary packaging provider has entered into an arrangement with ANZ for ANZ to issue Salary Packaging Cards to eligible and approved cardholders. By signing this form, you acknowledge that ANZ is not responsible for the deduction of the nominated amount listed in section 1 or for making any changes to this amount. Any questions, concerns or request for changes to this amount must be referred to your employer. ANZ accepts no liability in connection with your salary deduction arrangements.

ANZ will make your salary deduction available for use on your selected Salary Packaging Card once your application is approved and ANZ has processed your salary deduction from your employer or salary packaging provider.

You are only eligible to use the Salary Packaging Card while you are employed by your employer listed in section 2. Upon termination of your employment (either by you or your employer), your eligibility ceases and ANZ may in its discretion immediately cancel your Salary Packaging Card and return any available funds to your employer or salary packaging provider. Your employer may then deal with any returned funds in accordance with your employment contract or arrangement. You must immediately notify ANZ (either directly or indirectly via your salary packaging provider) if your employment is terminated.

You acknowledge that ANZ's responsibility is to make salary deductions from approved cardholders available for use on their Salary Packaging Cards once ANZ has processed them. ANZ is not responsible for, and accepts no liability for, salary deductions until such time as they are received and processed by ANZ.

ANZ accepts no liability for acts or omissions of your employer or any salary packaging provider in any way connected with your Salary Packaging Card that in any way causes loss or damage to you.