



## Request to change Construction Loan

Please print in CAPITAL LETTERS and place a cross ☒ in any applicable boxes.

### 1. Current Construction Loan details

#### Loan account number

Account number

#### Applicant 1

Surname

Given name(s)

#### Applicant 2

Surname

Given name(s)

### 2. New loan details

Upon completion of construction, varying or switching your Construction Loan to another AMP Bank Home Loan will require new loan account numbers to be issued.

#### Split loan 1

Account name

Product type (eg Basic Variable Rate Loan)

Loan amount for this account

Repayment frequency

☐ Monthly ☐ Fortnightly ☐ Weekly

Offset Deposit Account<sup>1</sup>

☐ Offset to be linked  
☐ Offset Account number 1  
☐ Offset Account number 2  
☐ Offset Account number 3

Payment type

☐ Principal and interest ☐ Interest only for  years (max. 10 years)

#### Split loan 2

Account name

Product type (eg Basic Variable Rate Loan)

Loan amount for this account

Repayment frequency

☐ Monthly ☐ Fortnightly ☐ Weekly

Offset Deposit Account<sup>1</sup>

☐ Offset to be linked  
☐ Offset Account number 1  
☐ Offset Account number 2  
☐ Offset Account number 3

Payment type

☐ Principal and interest ☐ Interest only for  years (max. 10 years)

<sup>1</sup> See information in section 4.

### Split loan 3

Account name

Product type (eg Basic Variable Rate Loan)

Loan amount for this account

Repayment frequency

☐ Monthly ☐ Fortnightly ☐ Weekly

Offset Deposit Account<sup>1</sup>

☐ Offset to be linked  
☐ Offset Account number 1  
☐ Offset Account number 2  
☐ Offset Account number 3

Payment type

☐ Principal and interest ☐ Interest only for  years (max. 10 years)

### Split loan 4

Account name

Product type (eg Basic Variable Rate Loan)

Loan amount for this account

Repayment frequency

☐ Monthly ☐ Fortnightly ☐ Weekly

Offset Deposit Account<sup>1</sup>

☐ Offset to be linked  
☐ Offset Account number 1  
☐ Offset Account number 2  
☐ Offset Account number 3

Payment type

☐ Principal and interest ☐ Interest only for  years (max. 10 years)

### 3. Amount payable

#### Fee payment details

☐ Cheque, or  
☐ Deduct from my card ☐ Visa ☐ Visa Debit ☐ Mastercard ☐ Mastercard Debit ☐ American Express

Amount

Credit card number

Expiry date

Cardholder's name

Signature

#### 4. Offset Deposit Account application

Up to 10 Offset Deposit Accounts can be linked to each loan split. An Offset Account Deposit may only be opened in one, some or all of the applicant(s)' names.

Loan Split 1 for		Access options required:			
		AMP Visa Debit Card	Cheque Book	Deposit Book	
Account Holders for Offset 1	Account Holder 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Account Holder 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Account Holders for Offset 2	Account Holder 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Account Holder 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Account Holders for Offset 3	Account Holder 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Account Holder 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Loan Split 2 for		Access options required:			
		AMP Visa Debit Card	Cheque Book	Deposit Book	
Account Holders for Offset 1	Account Holder 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Account Holder 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Account Holders for Offset 2	Account Holder 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Account Holder 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Account Holders for Offset 3	Account Holder 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Account Holder 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Please copy this page and attach if you require Offset Deposit Accounts on more than 2 loan splits OR more than 3 Offset Deposit Accounts per loan split.

#### 4.1 Source of funds

We will not be able to process your application if this section is not completed.

##### Applicant 1

Select the source of funds to be used for the offset account(s).  
Select the one response most relevant.

- ☐ Income from employment (regular and/or bonus)
- ☐ Investment income (eg rent, dividends/or bonus)
- ☐ Business income
- ☐ One-off payment (eg matured investment, court settlement, redundancy, inheritance)
- ☐ Sale of assets (eg shares, property)
- ☐ Windfall (eg gift, lottery winnings, gambling)
- ☐ Borrowed Funds
- ☐ Government benefits (eg childcare rebate, family tax benefit)

##### Applicant 2

Select the source of funds to be used for the offset account(s).  
Select the one response most relevant.

- ☐ Income from employment (regular and/or bonus)
- ☐ Investment income (eg rent, dividends/or bonus)
- ☐ Business income
- ☐ One-off payment (eg matured investment, court settlement, redundancy, inheritance)
- ☐ Sale of assets (eg shares, property)
- ☐ Windfall (eg gift, lottery winnings, gambling)
- ☐ Borrowed Funds
- ☐ Government benefits (eg childcare rebate, family tax benefit)

## 4.2 Nature and purpose of business relationship

We will not be able to process your application if this section is not completed.

### Applicant 1

Select your reason for opening the offset account(s). Select the one response most relevant.

- ☐ Everyday banking eg regular deposits and withdrawals for everyday expenses
- ☐ Business income eg regular deposits and withdrawals for everyday expenses (mostly for non-individuals)
- ☐ Savings eg regular deposits with few withdrawals, earning interest to grow your balance
- ☐ Building wealth eg a large initial deposit, using investment returns to grow your wealth over time

### Applicant 2

Select your reason for opening the offset account(s). Select the one response most relevant.

- ☐ Everyday banking eg regular deposits and withdrawals for everyday expenses
- ☐ Business income eg regular deposits and withdrawals for everyday expenses (mostly for non-individuals)
- ☐ Savings eg regular deposits with few withdrawals, earning interest to grow your balance
- ☐ Building wealth eg a large initial deposit, using investment returns to grow your wealth over time

## 4.3 Additional tax details

When opening an Offset Deposit Account you are required to provide the United States (US) taxation status of all applicants, even if they are also taxpayers in Australia.

Please indicate if you are a US citizen or resident for US tax purposes.

**Applicant 1** ☐ Yes ☐ No

**Applicant 2** ☐ Yes ☐ No

If you have responded 'Yes' to the preceding question please provide your US Tax Identification Number (TIN). For individuals this is typically your Social Security Number (SSN).

<b>Applicant 1</b>	SSN (numeric values only)		OR	TIN (numeric values only)
	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<b>Applicant 2 (if applicable)</b>	SSN (numeric values only)		OR	TIN (numeric values only)
	<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>			<input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Further information about this section can be found on the AMP website ([amp.com.au](http://amp.com.au)).

## 5. General declaration

I/We declare that I/we authorise that my/our Offset Deposit Account may be operated by one account owner, director or signatory. (If you require the Offset Deposit Account to be operated by more than one account owner or signatory, specify this in a **Change Account Signing Authority** form.)

## 6. Signatures

Name (Print in CAPITAL LETTERS)

Applicant 1 signature

Date

Name (Print in CAPITAL LETTERS)

Applicant 2 signature

Date