

Request to Switch a Deposit Product

 Please staple all relevant material together

Use this form to request to switch your deposit product to another type of deposit product.

For Self Managed Superannuation Funds (SMSF) request to switch your deposit product, please use the form **Request to Switch a Deposit Product – AMP SuperEdge Deposit Products**, available at amp.com.au.

Please complete all applicable sections of this form.

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

Important information

1. All account holders must sign this form.
2. The effective date for all switches is the next Business Day after this request is processed (generally within 48 hours). This means that any change to interest rates, fees and charges and all other terms and conditions for the new product will apply from the effective date.
3. Personal customers and sole traders – complete sections 1, 2, 3, 4 and 6.
4. Companies, trusts or other organisations – complete sections 1, 2, 3, 5 and 7.

1. Existing account number

My/Our existing account number is:

2. Switch from

Switch my/our Deposit Product **from**:

- eASYLiving
 eASYCash Management
 AMP First
 AMP Access Account
 Classic Transact Account
 Executive Transact Account
 AMP Cash Manager
 Cash Management Account (including All-in-One, Select Option or AMP Shareholder)

Switches to and from an AMP Saver Account, AMP Business Saver Account, Investment Builder Account, Founding Member Account or any other deposit product are not permitted. To replace any of these deposit products with a new deposit product you must complete an application form for a new deposit product and close your existing account.

Switches from AMP Business Saver Accounts are only available to SMSFs request to switch to an AMP SuperEdge Account. Please use the form **Request to Switch a Deposit Product – AMP SuperEdge Deposit Products**.

For switches from an Unlinked Offset Deposit Account, please use the **Request to Switch an Unlinked Offset Deposit Account** form.

3. Switch to

Indicate the type of deposit product you want to switch to:

- AMP Access Account
 AMP Cash Manager

4. Customer details – personal customers and sole traders

Account holder 1

Title

Mr Mrs Miss Ms Other

Family name

First name

Given name(s)

Date of birth

Current residential address (must not be PO Box)

Suburb

State

Postcode

Country of residence

If Other, please specify

Australia Other

Contact phone number

Account holder 2

Title

Mr Mrs Miss Ms Other

Family name

First name

Given name(s)

Date of birth

Current residential address (must not be PO Box)

Suburb

State

Postcode

Country of residence

If Other, please specify

Australia Other

Contact phone number

Additional forms to be completed for more than two account holders.

5. Customer details – companies, trusts and other organisations

Account in the name(s) of

Contact name

Contact phone number

6. Product features

AMP Access Account

This is a simple everyday transaction account with no fees and easy access to your money. Deposits in this account do not accrue interest, but all fees charged by Australian ATMs are rebated to your account. Easily manage your money with a Visa Debit card, eftpos and BPAY®, access to online banking, the My AMP app, phone banking and Bank@Post.

This product includes:

- No monthly fees or minimum balance
- Eftpos and BPAY facilities
- The option to access additional Basic Features as an eligible government concession card holder.

This product doesn't include:

- The ability to earn interest on your deposits
- A cheque book.

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6. Product features (continued)

AMP Cash Manager

This is an everyday transaction account with no fees, no minimum deposit and easy access to your money. Deposits in this account benefit from a competitive ongoing standard variable interest rate, and all fees charged by Australian ATMs are rebated to your account. Manage your money with a Visa Debit card, eftpos and BPAY[®], access to online banking, the My AMP app, phone banking and Bank@Post.

This product includes:

- A competitive interest rate with no monthly fees
- A Visa Debit card, eftpos and BPAY facilities
- The option to use digital wallets with Apple Pay, Samsung Pay or Google Pay.

This product doesn't include:

- The option to access additional Basic Features as an eligible government concession card holder
- A cheque book.

7. Privacy Collection Statement

Privacy Collection Notice

AMP Bank collects personal information from the applicants named in this form, which will be used (along with any other information we already hold) to process your deposit product account switch and manage the account throughout its lifecycle.

We are required or authorised to collect this personal information under various laws including those relating to taxation and Anti-Money Laundering and Counter-Terrorism Financing Laws.

If you do not provide the required information, we will not be able to action your request.

We will only share your personal information:

- with other members of the AMP Group and external service providers that we need to deal with for the purposes described above,
- as required by law or regulations with courts, tribunals or government agencies,
- with persons or third parties authorised by you, or if required or permitted by law.

We may also disclose your name, residential address and/or date of birth to a credit reporting body (CRB) for the purposes of requesting the CRB to provide an assessment whether this personal information matches (in whole or in part) the personal information held by them. The CRB may prepare an assessment using this personal information, comparing this personal information with the personal information the CRB has on you and other individuals. The CRB may provide this assessment to us. If you don't consent to this, we may have to use other reasonable means of verifying your identity or decline to proceed.

Some external service providers we need to deal with can be located or host information outside Australia. A list of countries where these providers may be located can be obtained via our privacy policy. We take all reasonable steps to ensure that any information shared with external service providers is secured to protect your information.

Marketing and other purposes

In addition to the purposes stated above we may use your personal information for marketing and research purposes. To opt out of direct marketing from AMP Bank, to obtain further information about how AMP handles your personal information or to request access to the personal information AMP holds about you, call 13 30 30 or write to: AMP Bank, Locked Bag 5059, PARRAMATTA NSW 2124 or email info@ampbanking.com.au.

The AMP Privacy Policy sets out further information about how you can access or update/seek correction of your personal information or make a privacy-related complaint. This can be viewed online at amp.com.au/privacy or contact us on 13 30 30 for a copy.

8. Declaration by applicant(s) – personal customers and sole traders

By signing below you declare, acknowledge and confirm that you:

1. Have instructed AMP Bank (us/we/our) to switch your existing deposit product to another deposit product as indicated in sections 2 and 3.
2. Have considered the contents of the Deposit Products Terms and Conditions and Deposit Products Fees and Charges Guide at amp.com.au/bank and agree to continue to be bound by these terms and conditions for the account(s) as set out in those documents.
3. Agree that all Access Methods (including but not limited to cheques, deposits, electronic payments and receipts, Access Cards, BankPhone, BankFax, BankNet and third party access) and their terms and conditions, if available on your new deposit product, will apply to your existing account after it is switched to the new deposit product.
4. Understand that we may decline this application for any reason in our absolute discretion.

By submitting this application you also acknowledge that we may decide to delay or refuse any request or transaction (this includes preventing withdrawals from the account) if we believe in good faith that allowing the transaction may cause us to commit an offence. We do not accept responsibility for any such delay or refusal.

Signature of account holder 1

X

Date

D D M M Y Y Y Y

Signature of account holder 2

X

Date

D D M M Y Y Y Y

9. Declaration by applicant(s) – companies, trusts and other organisations

By signing below the signatory(ies) on behalf of the company, or trust or other organisation declares, acknowledges and confirm you:

1. Have instructed AMP Bank (us/we/our) to switch the existing deposit product to another deposit product as indicated in sections 2 and 3.
2. Have considered the contents of the Deposit Products Terms and Conditions and Deposit Products Fees and Charges Guide at amp.com.au/bank and agree to continue to be bound by these terms and conditions for the account(s) as set out in those documents.
3. Agree that all Access Methods (including but not limited to cheques, deposits, electronic payments and receipts, Access Cards, BankPhone, BankFax, BankNet and third party access) and their terms and conditions, if available on the new deposit product, will apply to the existing account after it is switched to the new deposit product.
4. Understand that we may decline this application for any reason in our absolute discretion.

By submitting this application you also acknowledge that we may decide to delay or refuse any request or transaction (this includes preventing withdrawals from the account) if we have not been able to verify your or a signatory's identity, or if we believe in good faith that allowing the transaction may cause us to commit an offence. We do not accept responsibility for any such delay or refusal.

First signature

X

Date

D D M M Y Y Y Y

Position

Name of signatory

Second signature

X

Date

D D M M Y Y Y Y

Position

Name of signatory

Where to send this form

Return your completed form and any accompanying documents to:

AMP Bank
Reply Paid 79702
PARRAMATTA NSW 2124