



CHURCH EXTENSION FUND

ALBERTA | BRITISH COLUMBIA DISTRICT

Customer Information Form

The Lutheran Church-Canada, Alberta – British Columbia District Investments, Ltd.

7100 Ada Blvd. NW Edmonton, AB T5B 4E4

PH: 780-474-0063 or Toll Free: 1-888-474-0063 FAX: 780-477-9829

Email: cef@lccabc.ca

PORTFOLIO NUMBER: (OFFICE USE ONLY)
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CUSTOMER INFORMATION:			
LAST NAME	GIVEN NAME	INITIAL	SOCIAL INSURANCE NUMBER
HOME ADDRESS			DATE OF BIRTH (YY/MM/DD)
			()
CITY	PROVINCE	POSTAL CODE	PHONE NUMBER
EMAIL ADDRESS		CONGREGATION & LOCATION	

If your account is going to be joint or in trust,
an application form for each individual must be filled in. Please indicate
how you would like account set up on your deposit form.

PLEASE PROVIDE A PASSWORD FOR YOUR ACCOUNT	PASSWORD HINT (eg. Dog's name)

CUSTOMER'S SIGNATURE	DATE:

(FOR OFFICE USE ONLY)

ACCEPTANCE: This application is accepted by the Lutheran Church - Canada, The Alberta - British Columbia District Investments Ltd. on behalf of the Trustee.

AUTHORIZED SIGNATURE:	DATE:

CONDITIONS

1. Church Extension will automatically renew this investment for the same term at the interest rate in effect at maturity unless otherwise instructed.
2. The Investor(s) confirm(s) that the information set forth in this Agreement is true and correct.
3. The Investor(s) agree(s) to notify the Church Extension office of any address change.
4. Church Extension Fund will pay to the investor(s) in lawful money of Canada, the principal sum of this investment plus interest according to the terms stated in the investment agreement.
5. Investment withdrawals before date of maturity are permitted. Interest and applicable penalties on money withdrawn will be applied as per terms stated in the investment agreement.
6. Payments will be made to the investor(s) with a cheque issued by Lutheran Church - Canada, the Alberta - British Columbia District. Payments to joint owners with right of survivorship will be made upon the request by either owner and be considered as valid discharge of any trust in respect of the deposit.
7. Church Extension will use the principal sum of investments to provide assistance in the mission and ministry of congregations and agencies of Lutheran Church - Canada. This will be done through loans to LCC entities and enhancing the fund balance through careful reinvestment of surplus funds. All income, profit/loss belongs to the Church Extension Fund.
8. Church Extension is not required to provide notice of maturity to the Investor(s) but will strive to do so as staffing allows.
9. Investments become effective on the date of receipt in the Church Extension office.
10. Any funds received whether via cheque or electronic funds transfers that are returned to us for insufficient or unavailable funds will be charged a processing fee of \$10.00.

PRIVACY POLICY

In compliance with privacy legislation, we need to obtain your consent before collecting, using or disclosing your personal information.

We require the information on the application form so that we can account to you and provide you with reports respective to your investments in ABC District Investments.

Please note that we will not disclose any personal information to anyone other than:

- where permitted or required by law or court order (for example, we may disclose your Social Insurance Number as required by the Income Tax Act to prepare tax slips); or
- to a public authority, to aid in an investigation, or where an imminent danger could be avoided by disclosing the information.

Rest assured that your personal information will remain confidential.

You have the right to access, verify and amend the personal information with us. To amend your personal information, or if you have any questions or concerns, please call us at (780) 474-0063 or 1-888-474-0063.

You may withdraw or vary this consent at any time by giving us notice at the address at the top of the first page, such notice to be effective on the day following receipt.

By signing this application you are consenting to the disclosure of your personal information as described above.