

## AFGD Associate Declaration Form



Anglican Funds Grafton Diocese is required by the Australian Securities and Investment Commission to ensure that all of its account holders can be classed as an 'associate' or a 'sophisticated investor'.

Full Name: \_\_\_\_\_ Customer Number: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

I declare that I am (please tick one only)

- Anglican clergy
- An Anglican employee  
(e.g. at Bishop's Registry, a Parish, Anglican schools, Anglicare North Coast or St Cuthbert's Retirement Living)
- A member of a Parish Council
- A Diocese of Grafton 'board' member  
(e.g. Bishop-in-Council, Corporate Trustees, AFGD Board, Buildings and Property Committee, an Anglican School Council, Anglicare North Coast Board, St Cuthbert's Retirement Living Board)
- A volunteer in a Parish for at least 8 hours per week on an ongoing basis
- A volunteer in an Anglican organisation for at least 8 hours per week on an ongoing basis (e.g. an Anglican school, Anglicare North Coast or St Cuthbert's Retirement Living)

If you ticked one of the above, please advise the parish or organisation appropriate to your answer: \_\_\_\_\_

- I meet the requirements of a '**sophisticated investor**'  
(A declaration signed by a qualified accountant that you have net assets of at least \$2.5 million or gross income of at least \$250,000 for each of the last 2 financial years will be required)

Account Holder Signature: \_\_\_\_\_

Witness Name: \_\_\_\_\_

Witness Signature: \_\_\_\_\_

Date: \_\_\_\_\_