

planned giving Regular Electronic Planned Giving

GIVING MADE EASY

*"Each one should give, then, as they decide,
not with regret or out of a sense of duty;
for God loves the one who gives gladly."*

2 Corinthians 9:7



What is Regular Electronic Planned Giving?

It's an easy way for you to give regularly to the work of the Catholic Church within your Parish.

How does it work?

By completing the forms in this brochure, you authorise the Catholic Development Fund (as agents for your Parish) to transfer your gift (a set amount) automatically from your bank, building society, credit union or credit card to your Parish's planned giving account on a monthly basis.

Are there any costs?

The CDF makes no charge on this facility. However, some banks, building societies and credit unions may charge a transaction fee, depending on the type of account you have with them. You can check this with your financial institution.

What are the advantages for you?

Having decided to set aside an amount as your regular gift, you have the satisfaction of knowing that:

- It's transferred automatically to your parish planned giving account.
- It's convenient and saves your parish the cost of providing envelopes. It also reduces the work and risk for your Parish associated with handling cash donations.
- It's safe. It eliminates the need for you to find and carry cash each week.
- It's flexible. The amount can be increased, decreased, postponed or cancelled at any time by notifying your Parish Priest in writing.
- It's confidential.

When you're away or attending Mass at another Parish, your gift takes place without having to catch up when you return.

What are the advantages for your Parish?

It provides a regular income. Budgeting becomes more accurate and the necessary cash flow is constant.

It saves time and is safer. There is less cash to handle and it reduces the work of voluntary counters in your Parish.

How you can participate in Regular Electronic Planned Giving

Complete the attached application to pay form and deliver to your parish office.

The role of the CDF in the Diocese

The CDF is a financial intermediary that exists to further the pastoral mission of the Church in our diocese. It does this by lending members funds to finance diocesan and parish projects. The fund also generates income for the diocese to help fund pastoral works. The CDF has been operating successfully in this diocese for over 40 years. All investments are guaranteed by the total assets of the diocese.

Specifically, money invested with the CDF is used to fund new facilities, refurbish existing buildings as well as for general school and parish needs and aged care facilities. In this sense any account opened with the CDF is aiding the mission of our diocese.

The CDF offers a range of products to our members:

- Term Deposits
- Pensioner Club
- Premium Saver
- Student Account
- Christmas Club
- Savings Account

For further information about the CDF phone 1800 810 330 and speak to our helpful staff or log on to our website www.cdfmn.com.au



Diocese of Maitland-Newcastle

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Newcastle NSW 2300

Notes for completion of Direct Debit Request forms for the Catholic Development Fund

Planned Giving contributors must complete the following forms –

1. Direct Debit Request form DDR

BSB Number

This is an Australian standard by which every branch of every financial institution can be identified. This number is best checked with your financial institution ie bank, building society and credit union. It is always a six (6) digit number.

Personal Account Number

Please note that credit card and debit card numbers as they appear on the face of plastic cards cannot be used.

The account information required is the actual number of your cheque, savings or access account. Care must be taken in correctly identifying the account to which a debit or credit card may be linked. Account numbers in all instances do not exceed nine (9) digits.

2. Application to pay Planned Giving Contributions by Direct Debit

An important note for Parishioners

Before returning the completed forms to your Parish Priest, please ensure the accuracy of the details provided about your personal account and your financial institution. Correct information is essential for the processing of your instructions by the Catholic Development Fund and its banker the Commonwealth Bank.

Inaccurate information will delay the process and will mean that the forms have to be returned to the Parish for referral to the parishioner.

Please ensure also that all forms are signed.

Customer's Authority

I/We
NAME OF PARISHIONER(S) GIVING THE DDR

of
PARISH NAME/SUBURB

authorise you **The Catholic Development Fund**

Diocese of Maitland-Newcastle

025223

NAME OF DEBIT USER

APCA USER ID NUMBER

to arrange for funds to be debited from my/our account at the financial institution identified below through the Bulk Electronic Clearing System (BECS).

This authorisation is to remain in force in accordance with the terms described in the **Application to pay Planned Giving Contributions by Direct Debit.**

...../...../.....
SIGNATURE DATE

...../...../.....
SIGNATURE DATE

Details of Account to be Debited
(All account details must be supplied)

.....
NAME OF FINANCIAL INSTITUTION

.....
ACCOUNT NAME

□ □ □ - □ □ □ □ □ □ □ □ □ □ □ □ □ □
BSB NUMBER ACCOUNT NUMBER

Parish to fill in

The payment is for my/our Planned Giving Contributions identified by Planned Giving Number

Please tick the box

I/We request that you debit my/our account in accordance with our agreement

Agreement

\$
AMOUNT TO BE DEBITED FIRST PAYMENT DATE

The frequency of the debit is once per month.

(If the direct debit should fall on a weekend or public holiday, it will not be actioned until the next working day).

.....
SIGNED BY CUSTOMER

.....
SIGNED BY CUSTOMER

Application to pay Planned Giving Contributions

Dear Father,

I/We hereby make application to pay my/our Planned Giving contribution for

.....
PARISH NAME/SUBURB

1. Name:

Address:

..... Postcode.....

Phone:

2. Value of Planned Giving Promise: \$ (monthly)

3. This authority will commence on/...../.....

4. My planned giving number is (Parish to complete)

5. I would like my monthly contribution to be debited

as per the attached direct debit request

OR

from my credit card

Please debit my: Bankcard Mastercard VISA

Card Number

Expiry Date/...../.....

I/We will advise the Parish Priest of the cancellation of this authority and will not hold the Parish Priest responsible for any action arising from my/our not doing so.

6. Signature(s):

Date:/...../.....

