

# Licensee Membership Application

## Credit Ombudsman Service – Membership Office

T 02 9273 8455 F 02 9273 8445 M PO Box A252, Sydney South NSW 1235 E members@cosl.com.au

This form will assist us to collect information required to assess and approve an application for membership of the Credit Ombudsman Service Limited as an Australian Credit Licence ('ACL') and/or Australian Financial Services Licence ('AFSL') holder or any membership type other than a credit representative.

Please complete all relevant fields and ensure that persons with appropriate authority have signed and dated the Member Agreement (see section 7). If you require assistance or have any questions about completing this application, please call us on 02 9273 8455 between 9.00am – 5.00pm Monday to Friday (excluding public holidays) AEST.

An email will be sent within 5-7 working days of receipt advising commencement of processing. If for any the reason we unable to process the application this email will notify any additional information we may require.

Applications generally complete processing within working 10 days. An email is sent as confirmation of membership activation and the COSL Member number at this time. A membership kit including a Member certificate, tax invoice and other documents will then be posted shortly after.

For more information about the Credit Ombudsman Service and to see the latest updates, please visit our website [www.cosl.com.au](http://www.cosl.com.au)

## Privacy Information

1. Any personal information collected, used or disclosed from time to time by the Credit Ombudsman Service Limited (COSL) is for the purpose of enabling COSL (through its employees, contractors, agents and directors) to process an application for membership or renewal or a change of membership details; to discharge its functions under its Constitution and Rules, including facilitating the resolution of complaints in its capacity as an external dispute resolution ('EDR') scheme; and to discharge its reporting obligations to the Australian Securities and Investments Commission ('ASIC').
2. COSL may publish your personal information (for example: name, COSL Member number, contact details) on the COSL website and any public list of COSL Members (whether paper-based or electronic) maintained by COSL.
3. COSL will publish in its annual report, among other details, the number of complaints received about you. This is an ASIC requirement.
4. COSL may disclose your personal information to others where this is permitted under its Constitution or Rules or where this is authorised or required by law. This may include disclosing personal information to:
  - (a) a relevant industry body or its disciplinary tribunal;
  - (b) the COSL Board;
  - (c) ASIC;
  - (d) another ASIC-approved EDR scheme;
  - (e) complainants who have referred a complaint to COSL;
  - (f) COSL's service providers, such as lawyers, accountants, IT consultants, printers, or mailing houses; or
  - (g) any other person as may be authorised or required by law.

## Application Checklist

|  |                          |
|--|--------------------------|
| Completed Membership Type details and advised the Licence number (if relevant).  | <input type="checkbox"/> |
| Completed or attached a list of representatives that are employees or directors and/or have been authorised as representatives.                              | <input type="checkbox"/> |
| Completed the contact details of the accounts contact, complaints person contact, corporate nominee.   | <input type="checkbox"/> |
| Completed the fee schedule by selecting the appropriate membership fee/s and calculated the correct fee payable. Please contact our office for an questions, | <input type="checkbox"/> |
| The relevant persons with appropriate authority have signed the Membership Agreement (see section 7).  | <input type="checkbox"/> |
| The details for payment are completed or a cheque or confirmation of payment through internet/phone banking is attached.                                     | <input type="checkbox"/> |

| Office use only  |           |                       |          |      |
|--|-----------|-----------------------|----------|------|
| Approved: Yes <input type="checkbox"/> No <input type="checkbox"/> | Amount \$ | BPAY / EFT / Chq / CC | Approved | Date |



## 1 Licence Details

1.1 ACL Number

1.2 AFSL Number

## 2 Applicant Details

### 2.1 Membership Type

- Individual  >> Continue to section 2.2 if application being made in the name of a 'natural person'.
- Partnership  >> Continue to section 2.3 to add each partner names.
- Company  >> Continue to section 2.4 to add company details

### 2.2 Individual Name

Given Names

Last Name

>> Continue to section 2.5

### 2.3 Partners Names

Given Names

Last Name

Given Names

Last Name

Given Names

Last Name

>> Continue to section 2.5

### 2.4 Company Details

Company name

Trading name

ABN/ACN

Director's names

>> Continue to section 2.5

### 2.5 Registered/Physical Address

Address 1

Address 2

Suburb

State/Postcode

>> Continue to section 2.6

### 2.6 Contact Details

Phone

Fax

Mobile

Email

Website

>> Continue to section 2.7

### 2.7 Communications

Membership renewal notices and other communications from us, such as Member News, are sent via email. >> Continue to section 3

If you wish to receive a printed version of the Annual Report, please tick here >>











