

i When completing this form, please answer all questions and print the names of all Trustees clearly in the section indicated on the first page. After answering all questions in their entirety, please have **all trustees** sign in the appropriate area on the last page of the document. In order for this Trustee Certification to be a valid substitution for your Trust Agreement, this form **must** be completed in its entirety and must be signed by **all trustees**.
Please be advised that we will not be able to open your account without the information requested in this form.
This form uses JavaScript for optimal performance. Please ensure you have this enabled if completing electronically.
Refer to the end of this document for [submission instructions](#).

1. Account Information

Commonwealth Securities Limited

Account number

2. Trust Information

Title of the trust to which this certification applies - *Do not abbreviate the Title of the Trust. Must match Part I of W-8BEN-E form*

Effective date of trust

Latest amendment or restatement date - *If applicable date of last change, if no change put N/A*

Grantor/s, settlor/s or testator/s who established the trust - *For SMSF's the members can be regarded as the Settlor*

Trust Type

☐ Superannuation (SMSF) ☐ Family ☐ Unit ☐ Revocable ☐ Irrevocable

i For Family Trusts the Settlor or Founder should always be show on the Trust Deed and could be a lawyer, accountant or person outside the Trust.

Governing state law - *Where the Deed was drafted*

U.S. tax ID/social security number - *Only applicable to U.S. citizens or greencard holders*

Trust ABN

There are no other trustees of the trust other than the undersigned.

Please tick one of the following - Mandatory

- ☐ The Trust Agreement explicitly authorizes each of the following Trustees **to act individually without the approval of the Other trustees**. Commonwealth Securities Limited has the authority to accept orders and other instructions relative to the Trust account from any one of these Trustees, acting alone, and they may execute any documents on behalf of the Trust which Commonwealth Securities Limited may require.
Note: Although the Trust may allow a Trustee to act individually, under certain circumstances, in their discretion Commonwealth Securities Limited or PERSHING may require that the written approval of all Co-Trustees be obtained.
- ☐ The trust agreement DOES NOT authorise the trustees to act individually on behalf of the trust account.

Trustee 1

Trustee Name

Street address

Suburb

State

Postcode

Trustee 2 – If applicable

Trustee Name

Street address

Suburb

State

Postcode

Trustee 3 – If applicable

Trustee Name

Street address

Suburb

State

Postcode

Country

Trustee 4 – If applicable

Trustee Name

Street address

Suburb

State

Postcode

Country

Successor trustee/s name/s - If unknown, leave blank

3. Trustee/s Indemnification and Signatures - Please read and sign below

The undersigned Trustees jointly and severally indemnify Commonwealth Securities Limited and PERSHING, and each of their affiliates, officers, directors, employees, agents, successors or assigns harmless from any liability (including attorney's fees) from any claims, judgments, expenses, liabilities or costs of defense or settlement arising out of or related to breach of any representation or warranty made herein, or from effecting any transfers or transactions pursuant to instructions given by any of the Trustees or Successor Trustees listed above, or any actual improper or unsuitable action resulting from instructions given to Commonwealth Securities Limited or PERSHING by any of the Trustees. This indemnification is made by us both in our capacities as Trustees and in our individual capacities. We certify that the Trust is currently in existence, had not been revoked, modified or amended in any manner that would cause the certifications herein to be incorrect and, we agree to inform Commonwealth Securities Limited IMMEDIATELY in writing of any amendment to the Trust, any change in the composition of the Trustees, or any other event which could alter the certifications made above. We acknowledge Commonwealth Securities Limited or PERSHING's right to examine the Trust Agreement and hereby agree to provide Commonwealth Securities Limited or PERSHING with a copy of the Trust Agreement if so requested. (Where applicable, plural references in this certification shall be deemed singular.)

Trustee 1

Full name

Date – DD / MM / YYYY

 / /

Signature – Digital Signature NOT accepted

Trustee 2 – If applicable

Full name

Date – DD / MM / YYYY

 / /

Signature – Digital Signature NOT accepted

Trustee 3 – If applicable

Full name

Date – DD / MM / YYYY

 / /

Signature – Digital Signature NOT accepted

Trustee 4 – If applicable

Full name

Date – DD / MM / YYYY

 / /

Signature – Digital Signature NOT accepted

Commonwealth Securities Limited (CommSec) ABN 60 067 254 399 AFSL 238814, a Participant of the ASX Group and Chi-X Australia.

How to submit your documents

Once completed and signed, send or email the form and supporting documents to

✉ CommSecInternationalDesk@cba.com.au

📍 **CommSec International Trading Desk**

Locked Bag 22

Australia Square NSW 1215

📞 1300 361 170

🌐 commsec.com.au