

CALIA+ FIXED SUBACCOUNT FORM

Where to send this form?

Please provide your completed and signed form with any relevant supporting documents to your adviser.

Adviser use only: Please return this form to investmentlending@cba.com.au

Use this form to add a Fixed LOC to an existing CALIA+ Facility.

CLIENT NAME/S

FACILITY NUMBER

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ADVISER NAME

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NECESSARY INFORMATION FOR ALL FIXED LOANS:

PURPOSE:

PERSONAL INVESTMENT

LOAN TO BE FIXED IN:

ARREARS ADVANCE (INVESTMENT LOC ONLY)

TRAIL COMMISSION NOMINATION:

If you are a wholesale client please tick the box below to indicate if Trail Commission will be payable*

TRAIL COMMISSION - Wholesale Client Form has been submitted

TERM YEARS (MUST BE 1-5 YEARS)

BANK STATE BRANCH (BSB)	ACCOUNT NUMBER	CURRENT NOMINAL LIMIT	REQUESTED NOMINAL LIMIT
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
		BUNDLE LIMIT	
		CURRENT NOMINAL LIMIT	REQUESTED NOMINAL LIMIT
		\$ <input type="text"/>	\$ <input type="text"/>

FIXED INTEREST AMOUNT DEBITED FROM SUB-ACCOUNT

BANK STATE BRANCH (BSB)	ACCOUNT NUMBER
<input type="text"/>	<input type="text"/>

1. PLEASE ENTER YOUR APPROXIMATE ANNUAL GROSS INCOME (PRE-TAX)

BORROWER NAME/S

BORROWER 1	BORROWER 2
<input type="text"/>	<input type="text"/>

REQUESTED LIMIT

\$

2. CONVERT CURRENT CALIA+ VARIABLE LOC TO A FIXED LOC

BANK STATE BRANCH (BSB)	ACCOUNT NUMBER
<input type="text"/>	<input type="text"/>

- All fixed accounts must be fully drawn for the term of the loan, with no transactions.
- If converting an existing Variable LOC to a Fixed LOC purpose (Investment/Personal) cannot be changed.
- If you would like to increase the Bundle Limit, please complete the Bundle Limit Increase Form.

*We must have received a completed a Wholesale Client Form at the time the Facility was established for commission to be payable.