

Important Information

We accept this form returned to us by post or email. All pages must be present for the forms to be processed.
The email address is for administrative use only. All other enquiries should be directed through to the appropriate channels.

Post: CommSec Adviser Services Investment Loan, Locked Bag 34, Australia Square, NSW 1215

Email: mlopsclosures@cba.com.au

S1

Investment Loan Details – Compulsory

Investment Loan Number

Borrower Name/s

S2

Transaction Request – Compulsory

Close my Investment Loan – This will occur when the loan balance has been paid out in full and all security has been transferred.
This will terminate your margin loan facility

Repay my Investment Loan – This will leave your margin loan open with a zero balance

S3

Payment of Loan Balance – Compulsory

Balance to be paid will be inclusive of interest accrued (if not already direct debited) and any applicable fees.
Please indicate how you would like the loan to be repaid.

Proceeds from Redemption of Managed Funds – please indicate full details of redemption in Section 4 below.

Debit my linked bank account used for interest payments

Debit a new bank a/c – I have attached a Direct Debit Request form with this request.

Remaining Credit Balances – Complete if closing loan

- Credit my linked bank account ending in – Please ensure that the bank account to be credited is in the same name as the loan borrower/s as payments cannot be made to third parties.
- Direct credit remaining credit balance to the current account linked for monthly interest payments – Please ensure that the bank account to be credited is in the same name as the loan borrower/s as payments cannot be made to third parties.
- Direct credit to a new bank account. I have attached a Direct Debit Request Form.

We Value Your Feedback – If applicable

We would appreciate your feedback to help us continually improve our products and services.

What are the reasons for closing and/or repaying your Investment Loan? – You may select more than one response

- Product features
- No longer part of investment strategy
- Interest rate
- Poor customer service
- Financial adviser recommendation
- Market expectations
- Refinancing loan to
- Other

Please provide feedback on your response/s above or any suggestions on how we can improve our products and services?

Signed Authorities – Compulsory

We authorise CommSec Adviser Services Investment Lending to affect all instructions indicated on this request form.
If this is a Joint/Third Party/Company/Trustee account – please ensure all parties have signed the request.

Borrower 1 / Director 1 / Adviser

<input type="text"/>	<input type="text"/>
Full Name	Date - DD/MM/YYYY

Signature – must be signed pen on paper, electronic signatures not accepted

Borrower 2 / Director 2

<input type="text"/>	<input type="text"/>
Full Name	Date - DD/MM/YYYY

Signature – must be signed pen on paper, electronic signatures not accepted

CommSec Margin Loan and CommSec Adviser Services Investment Loan are products of the Commonwealth Bank Australia ABN 48 123 123 124, administered by its wholly owned but non-guaranteed subsidiary Commonwealth Securities Limited ABN 60 067 254 399 (CommSec).

Contact us

Clients

Please provide your completed and signed form with relevant supporting documents via provided details.

Email: mlopsclosures@cba.com.au

Mail: Locked Bag, 34 Australia Square NSW 1214

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Phone: 13 15 20

Web: commsecadviserservices.com.au