

REFINANCE REQUEST FORM FOR MARGIN LENDING

IMPORTANT INFORMATION

READ BEFORE PROCEEDING

We accept this form returned to us by post or email. Emailed forms should be scanned and sent in PDF format. 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 the appropriate channels.

Post: CommSec Margin Loans, Locked Bag 34, Australia Square NSW 1214
 Email: MLOpsNewLoans@cba.com.au

LOAN BORROWERS DETAILS

A

BORROWER(S) NAME(S) IN WHICH THE LOAN IS REFINANCING IN TO

LOAN ACCOUNT NUMBER:

BORROWERS RESIDENTIAL ADDRESS

STATE

POSTCODE

PHONE

EMAIL

EXISTING MARGIN LOAN DETAILS

B

MARGIN LOAN PROVIDER

NAME IN WHICH MARGIN LOAN ACCOUNT HELD

MARGIN LOAN ACCOUNT NUMBER:

HIN

 Please transfer ALL of my/our CHESS shareholdings/Managed Funds and Holder Identification Number (HIN)

OR
 Please transfer the CHESS shareholdings or Managed funds listed. Standard Transfer Form must be completed if you hold a managed fund.

Note: It may be necessary to re-lodge your standing instructions with the share registries after this transaction.

ASX CODE / APIR	SECURITY NAME / MANAGED FUND	NO. UNITS

 I / we have attached my/our most recent Margin Loan statement

Balance of the margin loan to be transferred

\$

 Please tick if the loan amount to be transferred is the whole loan balance

And transfer securities to:

Commonwealth Securities Limited
PID: 1402

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INSTRUCTIONS FOR EXISTING LENDER

C

Please be instructed that I/we would like to terminate my/our margin lending loan (listed in the existing margin loan details above) currently held with your company. I/We would like to transfer the financial products as described on page 1 of this form to CommSec. I/we will be refinancing my/our existing margin loan with a CommSec Margin loan (if non-advised)/ CAS Investment Loan (if advised).

Kindly arrange for the existing loan balance and other accrued obligations under my facility to be paid out by the Commonwealth Bank of Australia ("the Bank")

I/we hereby authorise you to provide the Bank with any information they may require in order to fully complete the refinancing of the loan (for example, the Bank will require proof of payment of stamp duty on my current loan with your office)

SIGNATURES FOR ALL EXISTING LOAN PARTIES REQUIRED

D

CLIENT 1 CLIENT ID

CLIENT 1 / BORROWER 1 / DIRECTOR / TRUSTEE / NAME

CLIENT 1 / BORROWER 1 / DIRECTOR / TRUSTEE / SIGNATURE

DATE

CLIENT 2 CLIENT ID

CLIENT 2 / BORROWER 2 / DIRECTOR / TRUSTEE / 3RD PARTY MORTGAGOR NAME

CLIENT 2 / BORROWER 2 / DIRECTOR / TRUSTEE / 3RD PARTY MORTGAGOR SIGNATURE

CLIENT 3 CLIENT ID

CLIENT 3 / BORROWER 3 / DIRECTOR / TRUSTEE / 3RD PARTY MORTGAGOR NAME

CLIENT 3 / BORROWER 3 / DIRECTOR / TRUSTEE / 3RD PARTY MORTGAGOR SIGNATURE

CONTACT US

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