

| | |
|-------------|-----------------|
| | |
| Loan Number | Borrower Name/s |

Please select one of the following options below.

- Suspend my Regular Gearing Plan – Please restart in MM/YYYY (Optional)
- Reallocate my Regular Gearing Plan – Please provide details below
- Commence my Regular Gearing Plan – Please provide details below

| | | | | |
|---|---|---|---|---|
| \$ <input style="width: 90%;" type="text"/> | + | \$ <input style="width: 90%;" type="text"/> | = | \$ <input style="width: 95%;" type="text"/> |
| Monthly Contribution | | Monthly Loan Advance | | Total Monthly Investment |

\$

Commencement Date*

*This Regular Gearing Plan (RGP) request must be received by our office before the 25th of the month in order for the changes to be made for the following month. Funds will be debited on the 13th of each month and will be sent to the fund manager(s) on the 15th of the month.

| Managed Fund Name | APIR Code – if known | Investor ID | Investor Name/s | Monthly Investment* |
|--|--|--|--|---|
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | \$ <input style="width: 80%;" type="text"/> |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | \$ <input style="width: 80%;" type="text"/> |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | \$ <input style="width: 80%;" type="text"/> |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | \$ <input style="width: 80%;" type="text"/> |
| <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | <input style="width: 95%;" type="text"/> | \$ <input style="width: 80%;" type="text"/> |

* Please ensure your monthly investment amount meets the minimum for each managed fund.

Fund Manager Requirements

Some fund managers may require a minimum investment amount and a completed managed fund application form for new or recommencing regular investment plans. Please confirm this requirement with the relevant fund manager.

I have attached fund manager application form(s) and have completed the regular investment section.

Changes To Bank Account Details

If you wish to change the bank account from which we debit your monthly contribution, please complete a Direct Debit Request Form from our website.

I have attached a signed Direct Debit Request Form.

Signatures

I/We authorise CommSec to affect all instructions indicated on this form

Borrower 1 / Director 1

| | |
|----------------------|----------------------|
| <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.

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Mail: Locked Bag, 34 Australia Square NSW 1214

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