

**Commonwealth Securities Limited**  
 ABN 60 067 254 399 AFSL 238814 (CommSec)  
 Participant of The ASX Group and Cboe Australia

**CommSec Margin Loan**  
 Locked Bag 34 Australia Square NSW 1215  
 Phone: **13 17 09**  
**commsec.com.au**

## Important Information: Read before proceeding

**We accept this form returned to us by email or post.** Emailed forms should be scanned. All pages must be present for the forms to be processed.

**Email:** [marginloan@commsec.com.au](mailto:marginloan@commsec.com.au)

**Post:** CommSec Margin Loan, Locked Bag 34, Australia Square NSW 1215

## 1. CommSec Margin Loan borrowers details

Borrower(s) name(s) in which CommSec Margin Loan is held

CommSec Margin Loan Account No:

Borrower's Residential address:



State

Postcode

Phone

Email

## 2. Existing Margin Loan details

Margin Loan provider

Name in which Margin Loan account held

Margin Loan Account Number HIN

X

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

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

Balance of the Margin Loan to be transferred

\$

And transfer securities to:

**Commonwealth Securities Limited PID: 1402**

### 3. Instructions for existing lender

Please be instructed that I/we would like to terminate my/our Margin 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.

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").

### 4. Signed Authority

All existing loan parties are required to sign.

#### Client 1

Client ID

Client/Borrower/Director/Trustee 1 Name

Signature – *Must be signed pen to paper*

Date signed – DD/MM/YYYY

 /  / 

#### Client 2 – *If applicable*

Client ID

Client/Borrower/Director/Trustee/3rd Party Mortgagor 2 Name

Signature – *Must be signed pen to paper*

Date signed – DD/MM/YYYY

 /  / 

#### Client 3 – *If applicable*

Client ID

Client/Borrower/Director/Trustee/3rd Party Mortgagor 3 Name

Signature – *Must be signed pen to paper*

Date signed – DD/MM/YYYY

 /  / 

CommSec Margin Loan is issued by Commonwealth Bank of Australia ABN 48 123 123 124 AFSL 234945. This product is administered by Commonwealth Securities Limited ABN 60 067 254 399 AFSL 238814 (CommSec), a wholly owned but non-guaranteed subsidiary of the Commonwealth Bank of Australia. CommSec is a Market Participant of ASX Limited and Cboe Australia Pty Limited, a Clearing Participant of ASX Clear Pty Limited and a Settlement Participant of ASX Settlement Pty Limited.

### How to submit your documents

Once completed and signed, please scan and email the form to:

✉ [marginloan@commsec.com.au](mailto:marginloan@commsec.com.au)

📍 **CommSec Margin Loan**

Locked Bag 34, Australia Square NSW 1215

📞 13 17 09

🌐 [commsec.com.au](http://commsec.com.au)