



Change or Removal of Adviser

Please refer to the end of this document for submission instructions.

Section 1 – Service Selection and Account Details

Which service/s are you nominating a new adviser for or removing an existing adviser from?

All applicable services relating to username – UserID

This is your UserID for the Geared Investments website. If unknown, call us on **13 15 20** to obtain.

Geared Investment Loan

Account name

Loan number

Section 2 – New Adviser Details

Adviser number, adviser code or username

Dealer Group name

Adviser name

Email address

Work number

Mobile number

Date of appointment (DD/MM/YYYY)



Note:

By nominating an Adviser you are providing them with full authority to act on your behalf in regards to your Geared Investments Loan.

Section 3 – Declaration and Acknowledgements

All account holders must sign this declaration.

- I/We declare that all details provided in this form are true and correct. I/We undertake to inform you of any changes to the information supplied, as and when they occur.
- I/We consent to my/our details being changed as indicated in this form.
- I/We authorise you to provide access to my/our account/s to my new adviser.
- I/We acknowledge that the new adviser will have all authority on my/our account/s as described in the relevant disclosure document.
- I/We authorise you to notify the fund managers of any managed investments I/we have lodged as security, of this adviser appointment.

Account Holder/Director/Secretary/Trustee 1

Full name

Date (DD/MM/YYYY)

Account Holder/Director/Secretary/Trustee 2 (if applicable)

Full name

Date (DD/MM/YYYY)

Signature (must be signed pen to paper)

Signature (must be signed pen to paper)



Note:

If there are more than 2 authorised signatories, please photocopy this page and attach to the form.

Geared Investments Loans are issued by Commonwealth Bank of Australia (The Bank) ABN 48 123 123 124 AFSL and ACL 234945 and administered by its wholly owned but non-guaranteed subsidiary Commonwealth Securities Limited ABN 60 067 254 399 AFSL 238814. Commonwealth Securities Limited is a market participant of the ASX and Cboe Australia (Formerly Chi-X Australia), clearing participant of ASX Clear Pty Limited and settlement participant of ASX Settlement Pty Limited.

How to submit your documents


Clients

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

If you are required to send Original Certified Copies of documents please send via post to:

 **Geared Investments, Locked Bag 34, Australia Square NSW 1214**

 gearedinvestments@cba.com.au

 13 15 20

 commbank.com.au/gearedinvestments