

Geared Investments Loan Closure or Repayment

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

Section 1 – Name to be Changed

Investment Loan Number	Borrower name/s
------------------------	-----------------

Section 2 – Transaction Request (mandatory)

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 Investment Loan.

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

Section 3 – Repayment of Loan Balance (mandatory)

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 – Please complete a *Direct Debit/Direct Credit Request* (available on our website) and return with this request.

Section 4 – Managed Funds Instructions (if applicable)

Specify the transaction you wish to perform.

Transfer all managed funds back to me – Please complete one *Standard Transfer Form* (available on our website) per Investor ID.

Full Redemption – This will sell down your entire managed fund investments held on the Investment Loan. Proceed to Section 5.

Partial Redemption – Please complete the table below with your partial redemption instructions and complete one *Standard Transfer Form* (available on our website) per account registration name to facilitate the transfer of the remaining managed back to you.



Important Notes:

Some Fund Managers may require an application form to be completed along with the Standard Transfer Form. Managed funds will only be transferred once the Loan balance has been paid out in full.

Standard Transfer Form – If there is a redemption to process, we will wait for this to finalise prior to the release of Managed Funds.

Regular Gearing – If you have indicated that you wish to close your Investment Loan or fully redeem your managed funds, the regular gearing plan will be cancelled.

Section 4 – Managed Funds Instructions (if applicable) (continued)

Managed Fund name	APIR Code (if known)	Investor ID	Investor name/s	Redemption Amount (% / \$ / Units)

Section 5 – Share Instructions (if applicable)

Convert all shares to Issuer Sponsored – This is the default option if no other option is ticked.

Transfer Holder Identification Number (HIN) to Broker

Broker Name	Account Number	HIN	Broker PID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Transfer all shares to Broker

Broker Name	Account Number	HIN	Broker PID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Shares will only be transferred once the Loan balance has been paid out in full.

Section 6 – Remaining Credit Balances (if applicable)

Credit my linked bank account ending in

Direct credit remaining credit balance to the current account linked for monthly interest payments – If no selection is made, this option will be chosen by default.

Direct credit to a new bank account. Please complete a *Direct Debit/Direct Credit Request* (available on our website) and return with this request.



Note:

Please ensure that the bank account nominated for payment is in the same name as the loan borrower/s as payments cannot be made to third parties.

Section 7 – 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?

Section 8 – Signatures

We authorise Commonwealth Bank 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/Director/Trustee/Adviser 1

Full name

Date (DD/MM/YYYY)

Signature (must be signed pen to paper)

Borrower/Director/Trustee (if applicable)

Full name

Date (DD/MM/YYYY)

Signature (must be signed pen to paper)

Commonwealth Bank Geared Investments Loan is issued by Commonwealth Bank of Australia ABN 48 123 123 124 AFSL 234945. This product is administered by Commonwealth SecuritAies 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

Please complete and return the form to us by email or post:

✉ mlopsclosures@cba.com.au

📄 **Geared Investments, Locked Bag 34, Australia Square NSW 1215**

📞 13 15 20

✉ gearedinvestments@cba.com.au

🌐 commbank.com.au/gearedinvestments