

Managed Fund Investment

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

Section 1 - Investment Loan Details

Investment Loan Number

Borrower name/s

Section 2 – Investment Amounts

Client Contribution*	Investment Loan Advance	Total Investment			
\$ +	\$	= \$			
*Section 3 must be completed if client is making a contribution.					

Important Note:

For the Investment to proceed please ensure your loan advance will not breach your current credit limit. Should you need to increase your credit limit please complete a Credit Limit Increase form downloadable from the 'Forms' section of our website.

Section 3 - Client Contribution Details (if applicable)

If you are making a contribution, please indicate from the options used for interest payments.

Debit my linked bank account used for interest payments

Debit a new Bank Account – I have attached a Direct Debit/Direct Credit Request form with this request.

Section 4 – Investment Selection

Platform Investments – please indicate the underlying investment allocations you wish to invest into.

Fund Manager Requirements – Fund Managers require an original application form for new investments, and may require a minimum investment amount. Please confirm this and obtain an application form directly from the relevant Fund Manager prior to submitting your request.

Regular Gearing Plan (RGP) changes – If you would like any changes to existing RGP please ensure you complete the Regular Gearing Amendment form.

Managed fund name	APIR Code	Investor ID	Investor name/s	(% or \$)

Total Investment

Section 4 – Investment Selection (continued)

 Important Note: Total allocation amount must be equal to investment amount under Section 2 Total allocation percentage for underlying investment must add up to 100% 					
Section 5 – Signed Authorities					
We authorise Commonwealth Bank to affect all ins	structions indicated on this request form.				
Borrower/Director/Trustee/Adviser 1 Full name	Borrower/Director/Trustee 2 (if applicable) Full name				
Date (DD/MM/YYYY)	Date (DD/MM/YYYY)				
Signature (must be signed pen to paper)	Signature (must be signed pen to paper)				
 Note: If this is a joint/company/trustee account – please ensure all parties have signed the request. Digital signatures not accepted, form 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 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

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

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