

Section 3 – Reinvest & Switch Allocation

If you have selected to either reinvest your proceeds or switch to another fund, please indicate your reinvestment or switch instructions below.

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

Managed fund name	APIR Code	Investor ID	Investor name	Quantity (%/\$/units)

I have attached the relevant Fund Manager application form/s to facilitate this reinvestment

Section 4 – Redemption Payment Instructions

Please specify how the sale proceeds are to be paid:

Credit all proceeds to my Geared Investments Loan

Credit all proceeds or partial proceeds amount of _____ to my linked bank account,
account number ending _____

Credit all proceeds or partial proceeds amount of _____ to a new bank account
(I have attached a Direct Debit/Direct Credit Request form)

Repay Geared Investments Loan
and transfer remaining proceeds to _____ Linked Account ending _____ or

_____ New bank account
(Direct Debit/Direct Credit request form attached)



Important notes:

Full redemption proceeds can only be credited to the bank account when there is sufficient equity within the Investment Loan.

Please note we do not transfer proceeds to third party bank accounts. Payments can only be made to a bank account held in the same name as the loan parties.

Please note that a Direct Debit/Direct Credit request form is required for proceeds to be paid to a bank account that is not already linked to the Investment Loan.

Section 5 – Signed Authority

I/We, authorise Commonwealth Bank to implement all the instructions indicated on this request form.

Investor/Director/Trustee/Third Party/Adviser 1

Full name

Date (DD/MM/YYYY)

Signature (must be signed pen to paper)

Investor/Director/Trustee/Third Party 2
(if applicable)

Full name

Date (DD/MM/YYYY)

Signature (must be signed pen to paper)



Notes:

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 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:

 cslmlr@cba.com.au

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

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