

Refinance Request for Geared Investments Loan

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

Section 1 – Loan Borrower Details

Borrower/s name/s in which the loan is refinancing in to

Account loan number

Residential address (cannot be a PO Box)

	State	Postcode

Contact number

Email address

Section 2 – Existing Margin Loan Details

Margin loan provider

Name in which margin loan account held

Margin loan account number

HIN

Transfer Instructions

Option 1 - Please transfer ALL of my/our CHESS shareholdings/Managed Funds and Holder Identification Number (HIN)

Option 2 - Please transfer the CHESS shareholdings or Managed funds listed. Standard Transfer Form must be completed if you hold a managed fund.

ASX Code/APIR	Security name/Managed fund	Quantity (No. of units)

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Notes:

To transfer more than 10 different holdings, photocopy this page, complete and attach to this form.

It may be necessary to re-lodge your standing instructions with the share registries after this transaction.

Section 2 – Existing Margin Loan Details (continued)

I/We have attached my/our most recent Margin Loan statement – Balance of the margin loan to be transferred

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

And transfer securities to:

Commonwealth Securities Limited
PID: 1402

Section 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 Commonwealth Bank Geared Investments. I/We will be refinancing my/our existing margin loan with a Geared Investments 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).

Section 4 – Signatures for All Existing Loan Parties Required

Client/Borrower/Director/
Trustee 1

Client ID

Full name

Date (DD/MM/YYYY)

Signature

(must be signed pen to paper)

Client/Borrower/Director/
Trustee 2 (if applicable)

Client ID

Full name

Date (DD/MM/YYYY)

Signature

(must be signed pen to paper)

Client/Borrower/Director/
Trustee 3 (if applicable)

Client ID

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 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:

✉ gearedinvestments@cba.com.au

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

📞 13 15 20

✉ gearedinvestments@cba.com.au

🌐 commbank.com.au/gearedinvestments