

Regular Gearing Plan Amendment Request

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

Section 1 – Borrower Details

Loan number Borrower name/s

Section 2 – Regular Gearing Plan Details

Please specify your instructions below.

Suspend my Regular Gearing Plan – Please restart in MM/YYYY (optional)

Reallocate my Regular Gearing Plan – Please provide details below

Commence my Regular Gearing Plan – Please provide details below

Monthly Contribution	Monthly Loan Advance	Total Monthly Investment	Commencement Date*
\$	+	\$	= \$

Managed fund name	APIR Code (if known)	Investor ID	Investor name/s	Monthly Investment^

* This Regular Gearing Plan (RGP) request must be received by our office before the 25th of the month in order for the changes to be made for the following month. Funds will be debited on the 13th of each Commencement Date* month and will be sent to the Fund Manager/s on the 15th of the month.

^ Please ensure your monthly investment amount meets the minimum for each managed fund.

Fund Manager Requirements

Some Fund Managers may require a minimum investment amount and a completed managed fund application form for new or recommencing regular investment plans. Please confirm this requirement with the relevant Fund Manager.

I have attached fund manager application form/s and have completed the regular investment section.

Changes To Bank Account Details

If you wish to change the bank account from which we debit your monthly contribution, please complete a Direct Debit Request Form from our website.

I have attached a signed Direct Debit Request Form.

Section 3 – Signatures

I/We authorise Commonwealth Bank to affect all instructions indicated on this form.

Borrower/Director 1

Full name

Date (DD/MM/YYYY)

Signature (must be signed pen to paper)

Borrower/Director 2 (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 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


Clients and Advisers

Once completed and signed, please scan and return the form to

 MLOpsRGP@cba.com.au

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

 gearedinvestments@cba.com.au

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 commbank.com.au/gearedinvestments