

## 1. NAME IN WHICH YOUR EXISTING ANZ SHARE INVESTMENT LOAN FACILITY IS HELD

This will be used to open a Trading Account through the ANZ Share Investing service. The ANZ Share Investing service is issued by CMC Markets Stockbroking Limited (CMC Markets Stockbroking), at the request of ANZ.

## 2. ANZ INVESTMENT LENDING ACCOUNT NUMBER

## 3. ARE YOU AN EXISTING ANZ SHARE INVESTING CUSTOMER?

Yes, please provide your existing ANZ Share Investing User ID^

No, please proceed to Q4.

^Your online loan facility will be linked to this User ID

## 4. ANZ SHARE INVESTMENT LOAN PHONE PASSWORD

A phone password is required for identification purposes when calling the ANZ Client Services Team. The password must be alphanumeric and between 6 – 8 characters. If you wish to change your password, please call us on 1800 639 330 between 8.00am to 6.00pm (Sydney time) on ASX Trading days.

## 5. EMAIL ADDRESS

Please provide your current email address.

## 6. DECLARATION

### Collection and disclosure of your information

ANZ is collecting your personal information to enable it to assess this application and for the purposes described in the product terms and conditions. Without this information ANZ may not be able to consider or approve your application. ANZ may disclose this personal information to CMC Markets Stockbroking, the provider of the ANZ Share Investing service. ANZ may also disclose this personal information to its related entities, and to agents, contractors and service providers that ANZ engages to carry out or assist its functions and activities. These may include entities located overseas. ANZ's Privacy Policy contains information about the location of these entities. ANZ's Privacy Policy ([www.anz.com/privacy](http://www.anz.com/privacy)) contains information about: any laws that require or authorise ANZ to collect certain information from you; how to access your information and seek correction of your information; and how you can raise concerns that ANZ has breached the Privacy Act or an applicable Code and how ANZ will deal with these matters.

### Promotion of other products and services

ANZ may use your personal information to help ANZ promote its products or services or those of its related entities or organisations that are in a product or marketing alliance with ANZ (alliance partners). ANZ may also disclose your personal information to its related entities or alliance partners to enable them or ANZ to tell you about a product or service. Where you do not want ANZ to tell you about its products and services or those of its related entities or alliance partners, you may call 13 13 14 at any time to withdraw your consent.

Your product terms and conditions and our ANZ Privacy Policy contain further information about our handling of the information we collect during the course of your relationship with ANZ. If you have provided information about someone else, please show them a copy of this clause so that they may understand how ANZ may use and disclose their information.

# ANZ INVESTMENT LENDING ONLINE CONVERSION REQUEST

By signing this form:

1. I/We authorise ANZ Investment Lending to open an ANZ Share Investing account on my/our behalf and convert my/our existing ANZ Share Investment Loan facility to an ANZ Share Investment Loan facility, linked to a Trading Account.
2. I/We have read and understood the ANZ Share Investing Trading Terms & Conditions (including the CHESS Sponsorship Agreement), CMC Markets Best Execution Policy, CMC Markets Stockbroking Financial Services Guide, ANZ Cash Investment Account Terms & Conditions and ANZ Financial Services Guide, which are all available on [www.anzshareinvesting.com](http://www.anzshareinvesting.com) or by calling us on 1300 658 355, and agree to be bound to each of the terms contained in them.
3. I/We agree to the collection, use and disclosure of my/our personal information by CMC Markets Stockbroking and ANZ in accordance with the ANZ Share Investing Terms and Conditions, CMC Markets Privacy Statement, ANZ Investment Lending Terms and Conditions and the ANZ Privacy Policy for the purposes of this application, which are all available on [www.anzshareinvesting.com](http://www.anzshareinvesting.com) or by calling us on 1300 658 355.
4. I/We confirm that the information provided by me/us which is in and/or accompanies this application is true, correct and complete.
5. I/We will notify ANZ and CMC Markets Stockbroking within 30 days of any change to my/our, or the entity for which I/we am/are opening this account's, tax residency details and/or tax residency status (this could include, but is not limited to, changes in Taxpayer Identification Number, primary nature of business or tax classification).
6. The power of attorney signed by me/us when opening my/our existing ANZ Investment Lending facility continues to apply in respect of my/our ANZ Share Investment Loan when linked to a Trading Account.

## Signature of client(s) requesting conversion

## Use these signing clauses if the account is for a Company or Trust.

Executed by (Print name of Company).

as Trustee for (Print name of Trust if applicable)


## In accordance with subsection 127(1) of the Corporations Act by authority of its director(s):

**If the company is a Sole Director/Secretary Company, the Director must write the words 'as Sole Director and Sole Company Secretary of the Company' in the space provided for the second signatory's signature.**


The ANZ Share Investing service is provided by CMC Markets Stockbroking Limited ABN 69 081 002 851 AFSL 246381 (CMC Markets Stockbroking), a Participant of the Australian Securities Exchange (ASX Group), Sydney Stock Exchange (SSX) and Chi-X Australia (Chi-X), at the request of Australia and New Zealand Banking Group Limited ABN 11 005 357 522 (ANZ). Disclosure documents relating to ANZ Share Investing products and services are available on [www.anzshareinvesting.com](http://www.anzshareinvesting.com) or by calling us on 1300 658 355. ANZ is the issuer of the ANZ Cash Investment Account, ANZ Share Investment Loan and V2 PLUS Account. The obligations of CMC Markets Stockbroking are not guaranteed by ANZ. CMC Markets Stockbroking and ANZ are not representatives of each other.

## Complete and return this form to:

 **Mail:** ANZ Investment Lending  
Reply Paid 4338, Melbourne VIC 8060  
(no stamp required)

 **Email:** [investmentlending@anz.com](mailto:investmentlending@anz.com)

## Contact us:

 **Phone:** 1800 639 330  
8am to 6pm  
(Sydney/Melbourne time)  
ASX trading days