

ANZ INVESTMENT LENDING CLOSURE REQUEST FORM



IMPORTANT: If you have an ANZ Share Investing Trading Account or a CMC Markets Trading Account that you access through an Adviser which is linked to this ANZ Share Investment Loan, this form will also authorise the closure of that Trading Account. If you have an ANZ V2 PLUS Account that is linked to this ANZ Share Investment Loan, this form will also authorise the closure of that account. For third party accounts, please complete an additional Account Closure Request Form for each account.

Please enter details for each account holder.

Client Account Number

Client/Director/Trustee 1

Title Mr Mrs Ms Miss Dr Other

First Name

Surname

Client/Director/Trustee 2

Title Mr Mrs Ms Miss Dr Other

First Name

Surname

Name of Company/Trust

SHARES

Section A – Transfer shares to a registry (“Issuer Sponsored Shares”)

Please transfer my/our shares held in my/our ANZ Investment Lending Account to Issuer Sponsored Holdings:

Please transfer entire holdings to an SRN; OR

Section B – Transfer shares to a broker (“Chess Sponsored Shares”)

Please transfer my/our shares held in my/our ANZ Investment Lending Account to another broker participant:

Sponsor (your existing broker name)

Sponsor’s ASX Participant ID (“PID”)

Account Number at the Sponsor

Your Holder ID Number (“HIN”)

Please transfer my entire HIN;
(All underlying shares held on HIN will be transferred along with the HIN); OR

Transfer all shares to the existing HIN as mentioned in **Section B** with another broker.

Off Market Share Transfers (Change of beneficial ownership): A fee of \$55.00 each for the first five share transfers and \$33.00 each for any subsequent ones needs to be paid for any Off Market Share transfers*. This can be paid using the following methods:

Debited from your ANZ Share Investment Loan (please ensure sufficient funds are available); OR

A cheque made payable to “ANZ Investment Lending”

MANAGED FUNDS

Redeem All

Transfer to my/our name(s)

Partial Redemption to cover balance of loan with remaining units transferred back to my name (Please provide fund name and units to redeem)

Name of Fund	APIR Code	Number of Units
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

*Subject to change

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FUNDS TRANSFER

- Please transfer any remaining balance to my nominated bank account
- Please transfer any remaining balance to the below account:

BSB Account number

Account name

Note:

- The bank account must be in the name of, or include the name of, your ANZ Share Investment Loan Account Name.
- If the account is not an ANZ bank account, we also require a copy of your bank statement, which includes the account name, BSB and account number.

REASON FOR YOUR ACCOUNT CLOSURE (OPTIONAL)

- I wish to keep my facility balance below \$20,000
- I wish to pursue a different type of investment
- I am seeking another form of financing
- I have a service or product-related issue (please provide details below)
- I am not happy with fees/interest charged
- I found it too time consuming to trade/monitor loan
- I am not comfortable with the market conditions
- I am not happy with advice given by Financial Planner/Broker
- I no longer need a share investment loan

Other reasons or additional comments

I/We request that my/our facility be closed according to instructions I have issued above.

Client/Director/Trustee 1

Name

Signature

Date


Client/Director/Trustee 2


Name


Signature

Date

Complete and return this form to:

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

 Phone: 1800 639 330, 8am to 6pm (Sydney time) on ASX trading days

 Fax: 1800 186 286