

ANZ INVESTMENT LENDING REFINANCE REQUEST



Note: Before completing this form ensure the securities are on ANZ's Approved Securities List (ASL). The ASL can be found on anz.com/investmentlending or by calling our Client Services Team on 1800 639 330.

If you wish for the units transferred to be held by a third party then please complete the guarantor form.

1. CLIENT DETAILS

Account name

Client account number

2. REFINANCE

Account name/existing loan in the name of

(Account name has to be in the same name)

Existing share investment/margin loan provider

Loan amount to be refinanced

\$

Phone number of existing share investment/margin loan provider

HIN

Account number

3. SECURITY TO BE TRANSFERRED

Please attach your most recent share investment/margin loan statement. Securities must be held in the same name and match the loan account.

Select one of the following options:

Full refinance (Please note the entire HIN will be transferred to ANZ's chess participant sponsor ANZ Margin Services Pty Ltd).

or

Partial refinance (Please indicate share or managed fund code, name and number of units you wish to refinance below).

Share/APIR code

Investor number (Managed Funds only)

Quantity

Note: The APIR code can be found on your current share investment/margin lending statement.

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4. AUTHORISATION

All Individual Trustees OR all Trustees for a Minor OR two Directors OR one Director and one Company Secretary must sign this application.

By executing below, you:

- (a) authorise ANZ to refinance your existing share investment loan to ANZ and to pay out any outstanding loan(s) against these shareholdings;
- (b) authorise the current lender to transfer the shares listed on the attached share investment loan statement to ANZ Margin Services Pty Ltd and to lodge any managed funds with ANZ;
- (c) understand that the transfer of securities may affect existing dividend payment instructions and you will need to monitor, and if necessary, amend them; and
- (d) authorise the current lender to provide ANZ with any information regarding your existing share investment loan.

Client/Director/Trustee 1

Name

Signature

Date

Client/Director/Trustee 3

Name

Signature

Date

Client/Director/Trustee 2

Name

Signature

Date

Director/Trustee 4


Name


Signature

Date


If the applicant is a company with a sole director/secretary, the director must sign and write the words 'as sole director and sole company secretary of the company' in the space provided for the second signatory's signature.

Complete and return this form to:

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

 **Email:** investmentlending@anz.com

Contact us:

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