



In connection with my/our application for an ANZ Share Investment Loan

In connection with my/our ANZ Share Investment Client Number

All Clients need to complete Sections A, C and D.

For Refinances, please complete Sections A, B, C and D.

SECTION A - ACCOUNT HOLDER DETAILS

Individual/Director/Trustee 1

Title First Name

Family Name

Individual/Director/Trustee 2

Title First Name

Family Name

Company Name

Trust (if applicable)

Mail Address

Suburb State Postcode

Contact Phone Number

Name of Platform (Wrap/Master Trust)

Client Investor Number

SECTION B - REFINANCE REQUEST

1. Existing Margin/Share Investment Loan

Account Name/Existing Loan in the name of:

Existing Loan Provider

Existing Account Number

2. Security to be Transferred

Please attach copies of your latest Loan and Platform statements.

Please note all the managed funds and cash holdings on the platform (detailed in Section A) will be transferred to ANZ Investment Lending.

Approximate loan balance \$

Did you borrow to fund any of the equity in the above investment(s)?

Yes No

If yes, does this include a mortgage over your main residential property?

Yes No

Amount borrowed against main residence \$



SECTION C – MANAGED FUNDS AND CASH ACCOUNT APPLICATION/LODGEMENT AUTHORITY

1. Lodging Existing Platform (Wrap/Master Trust) Security

My/Our managed funds and cash on the Platform are currently registered under the name of

I/We authorise for all existing managed funds and cash held on the Platform to be registered with ANZ Investment Lending. (Statement attached)

2. New Investments into Managed Funds

I/We authorise ANZ Investment Lending to pay the Platform provider to facilitate the managed funds applications detailed below:

Investment Breakdown

APIR Code	Fund Name	Total Investment
		\$
		\$
		\$
		\$
		\$
		\$
		\$
Total Investment		\$

Contribution Breakdown

My Contribution	\$
ANZ Contribution	\$
Total Contribution	\$

Please advise how you would like to organise payment for your new managed funds by completing the following:

<input type="checkbox"/> Cheque (as attached)	\$
<input type="checkbox"/> BPAY® (to my ANZ Share Investment Loan Account)	\$
<input type="checkbox"/> Pay from V2 PLUS account (attached to my ANZ Share Investment Loan Account)	\$

Note: Please check that the Total Contribution matches the Total Investment above.



3. Regular Geared Savings Plan (RGSP)

Your initial investment and monthly contribution can be selected at your discretion provided the total investment is above the minimum amounts required by the Platform (Wrap/Master Trust). You can also choose how much ANZ may contribute up to the Loan-to-Value Ratios (LVR) of the managed funds selected. This facility can only be implemented where managed funds are held as security in this loan.

If you elect to participate in a Regular Geared Savings Plan (RGSP), please ensure you abide by the following and complete the table below:

- Your contribution meets your Platform’s minimum monthly amount
- The total monthly contribution for each fund below meets their individual requirements.

APIR Code	Fund Name	Your Monthly Contribution (\$50 Minimum)	ANZ Monthly Contribution (\$50 Minimum)	Total Monthly Contribution (\$100 Minimum)
Total Monthly Contribution				

Please include your bank account details to fund your contribution. This account will be direct debited on a monthly basis:

Account Name BSB Account Number

Monthly Contributions

- We will debit your monthly contributions from your account in line with the Platform providers date for accepting contributions.
- Different Platform providers have different debit dates.
- Your monthly contribution will not be debited until your application has been approved.
- Funds must be available in your nominated account by the first week of each month.



SECTION D - SIGNATURES AND TRANSFER AUTHORISATION

In the sections detailed within this authority (where relevant), I/We authorise:

- ANZ Investment Lending to refinance my existing margin loan to ANZ and to pay out any outstanding loan(s) against these holdings.
- The current lender to transfer the managed funds and cash as shown above to ANZ Investment Lending and to lodge any managed funds with ANZ.
- And understand that the transfer of securities may affect existing dividend payment instructions and I will need to monitor and, if necessary, amend them.
- The current lender to provide ANZ Investment Lending with any information regarding my existing loan.
- ANZ to pay my Platform provider to process the applications as detailed in this instruction.
- The Platform provider to transfer my holdings to ANZ and act on their instructions.
- ANZ to provide loan information and this authority to my Platform provider.
- All existing managed funds and cash held on the Platform to be registered with ANZ Investment Lending.

Signature(s) of Account Holders(s) authorising transfer

Account Holder 1

Full Name

Title (if company holding)

Signature

Date (DD/MM/YYYY)

Account Holder 2

Full Name

Title (if company holding)

Signature

Date (DD/MM/YYYY)

Customer Request Checklist

- Attached is the completed and signed Platform (Wrap/Master Trust) Application Form.
- Attached is a copy of your most recent Platform statement.
- Attached is your cheque (if applicable).
- Existing Loan provider details completed (Section B1).
- Attached is a copy of your most recent Loan statement.
- Does your Total Contribution (Your contribution plus ANZ's Contribution) equal Total Investment?