

Complete this form to transfer margin loan(s) from another margin lender to Direct Margin Lending.

**Section 1
Borrower
Details**

Name of borrower(s) on the Direct Margin Lending Facility

Client Reference Number

Name of third party security provider(s) *(if applicable)*

**Section 2
Details of
Current
Margin Lender**

Name of current margin lender

Account number

Name on margin loan account

Name of third party security provider(s) *(if applicable)*

Third party security provider(s) must be registered with Direct Margin Lending on the borrower(s) facility

Current Holder Identification Number(s) HIN(s) - as they appear on your CHESS statement

Is your loan with your current provider fixed?



Yes
 No

If "Yes":

1. What is the maturity date? *(must be maturing within 30 days)* / /

2. Do you want your refinance to take place on or as near as possible to this maturity date?

If "Yes", *Direct Margin Lending will endeavour to refinance closer to this date.*

If "No", *Direct Margin Lending will endeavour to refinance as soon as possible.*



Yes
 No

Section 3 Please indicate type of refinance below:

Refinance Request

- Full refinance from the abovementioned margin lender. *Please skip to section 4.*
- Partial refinance as per table below. Specify loan amount to be discharged \$ _____

Share Transfer Request

Please complete table(s) below:

- Transfer my entire HIN
Direct Margin Lending will transfer your HIN
- OR**
- Transfer partially (*please complete table below*).

| Share name | ASX code | Quantity* | HIN^ |
|------------|----------|-----------|------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

* If you'd like to transfer all your shares, please write "ALL".

^ If you do not already have a HIN, we will create a new HIN for you in the same name as your margin loan account.

Attach an additional sheet if there is insufficient space.

Managed Fund or Master Trust Transfer Request

- Transfer all my managed funds
- OR**
- Transfer partially (*please complete table below*).

| Managed Fund Name | APIR Code (if known) | Units* | Name of Holder of Managed Funds |
|-------------------|-------------------------|--------|------------------------------------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

* Write "ALL" if you would like all your shares/units to be transferred.

Attach an additional sheet if there is insufficient space.

Section 4 Declaration I/We hereby authorise Direct Margin Lending to pay out any outstanding loan balance against my/our portfolio or part listed above, as the case may be.

Borrower/Trustee/Director 1

Signature

X

Date

____ / ____ / ____

Borrower/Trustee/Director 2

Signature

X

Date

____ / ____ / ____

Third Party Security Provider 1

Signature

X

Date

____ / ____ / ____

Third Party Security Provider 2

Signature


X

Date

____ / ____ / ____

Note: When signed under Power of Attorney, the attorney states that they have not received a notice of revocation. A certified copy of the Power of Attorney needs to be sighted.

You may have to re-lodge your standing instructions with share registries after some transfers. These include tax file numbers, banking details and dividend instructions.



Please send the completed form to:
Direct Margin Lending
Reply Paid 1842
Royal Exchange NSW 1224