

Complete this form to transfer margin loan(s) from another margin lender to Direct Margin Lending.  
**Please Note:** The loan and refinance amount is subject to credit approval

## 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