



# Refinance Authority

Suncorp Metway Limited ABN 66 010 831 722. AFSL 229882

Complete this form to transfer margin loan/s from another margin lender to Suncorp Margin Lending.  
If you have any questions please contact your Account Manager on 1800 805 972 Intl 612 9236 3471.

**If you are new to Suncorp Margin Lending, please complete and attach a Suncorp Margin Lending Application form**

## 1. Margin Loan Details

Name of borrower/s on the Suncorp Margin Lending Facility Client Reference No.

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Name of third party security provider/s (if applicable)  
(Third party security provider/s must be registered with Suncorp Margin Lending on the borrower/s facility.)

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Name of your current margin lender Account Number

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

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Name on margin loan account

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Is your loan with the current provider fixed?

No

Yes If "YES"

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

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

Yes – Suncorp Margin Lending will endeavour to refinance closer to this date.

No – Suncorp Margin Lending will endeavour to refinance as soon as possible.

## 2. Refinance Request

Do you authorise the transfer of your entire portfolio including your Holder Identification number/s to Suncorp Margin Lending?

Yes > Go to section 3

No > Partial Refinance as per table below. Please specify loan amount to be discharged \$ \_\_\_\_\_

### Share Transfer Request

- Transfer my entire HIN – Suncorp Margin Lending will transfer your HIN
- Transfer partially (*please complete table below*)

Share Name	ASX Code	Quantity <sup>^</sup>	HIN*

\*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.

<sup>^</sup> If you'd like to transfer all your shares, please write 'ALL'.

### Managed Fund or Master Trust Transfer Request

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

Managed Fund Name	APIR Code (if known)	Units <sup>^</sup>	Name of Holder of Managed Funds.

Attach an additional sheet if there is insufficient space

<sup>^</sup> If you'd like to transfer all your shares/units, please write 'ALL'.

**Please send the completed form to:**

**Suncorp Margin Lending, Reply Paid 1877, Royal Exchange NSW 1225 OR Fax 1300 305 499 Intl 612 9995 8227**

### 3. Declaration

I/We hereby authorise Suncorp 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

Borrower/Trustee/Director 2

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Third Party Security Provider Signature 1

Third Party Security Provider Signature 2

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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 may include tax file numbers, banking details and dividend instructions.

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