



Savings Gearing Loan Application

Suncorp Metway Limited ABN 66 010 831 722. AFSL 229882.

If you have any questions please contact our Account Management Team on 1800 805 972 Intl 612 9236 3471.

Complete this form to set up a new Savings Gearing Loan or amend/cancel your existing Savings Gearing Loan.

Note: Not all managed funds or master trusts, allow regular contributions. Minimum initial investments and minimum monthly investments may apply. Ask your adviser or fund manager for details.

Borrower Details

Name of Borrower/s

(exactly as it appears on the Suncorp Margin Lending Application) If the borrower is a Trust or Company please specify the Company or Trust name.

Borrower Client Reference Number (if known)

Savings Gearing Loan Limit

The Savings Gearing Loan will continue until we receive a written authority from you to cancel this plan.

You can set a limit at any time by contacting our Account Management Team on 1800 805 972.

Initial Investment

If you wish to make an initial contribution to your specified Managed Fund Investment/s, please complete and attach the Managed Funds Investment form. You can also download this form from our website marginlending.suncorp.com.au

Monthly Investment

Specify the managed funds or master trusts in which you would like to make your initial investment.

New/Amend*/Cancel	Name of Managed Fund or Master Trust	Your monthly Contribution	Monthly Margin Loan Advance	Total Monthly Investment per fund
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
		\$	\$	\$
Total Monthly Investment				\$

*If amending, only include details of those investments that need to be amended.

Cash Management Trust Account

By applying for a Savings Gearing Loan, you authorise us to open a Cash Management Trust Account (CMA) on your behalf. The CMA will be opened in the name of our nominees.

This CMA is set up to collect part of the payment for your investments from your variable loan and the other part from your external bank account as you instruct under the Direct Debit Request section below. In addition, your fund manager will be provided authority to draw on this CMA for your total monthly investment.

NOTE: This CMA cannot be used for any other purposes, e.g. interest or dividend payments. If you wish to do so, you may set up another CMA by completing a Cash Management Trust Account form.

Tax File Number or Australian Business Number

In order to operate a saving gearing loan we need to establish an account on your behalf in our nominee name, therefore we ask that you specify your Tax File Number (TFN) or Australian Business Number (ABN). However, if you choose not to, tax may be charged on your Cash Management Account at the highest marginal rate plus the Medicare levy.

Borrower

Are you an Australian resident for tax purposes?*

First Borrower/Trustee/Director

No Yes

Second Borrower/Trustee/Director

No Yes

Company or Trust Borrower

No Yes

* If you are a non-resident for Australian taxation purposes then interest, dividends and royalties paid to you from an Australian source may be subject to withholding tax.

Direct Debit Details

Direct Debiting is not available on a full range of accounts. If in doubt please refer to your financial Institution.

This request is to enable Suncorp Margin Lending (USERID 146549) to deduct monthly contributions for savings gearing. By signing this request, I/we, the account holder/s whose account is identified below, authorise you, Suncorp Margin Lending, to use the Direct Debit system to debit my/our account identified below in accordance with the terms of this request. This Direct Debit Request is subject to the terms and conditions of the Direct Debit Service Request Agreement.

Name of Applicant/s - Individual/Joint/Company/Trust

Name of Financial Institution

Branch Name

BSB number

:

:

:

Account Number

Account Name

I/We request that you debit my/our account for payments to my Loan Account being the monthly contributions for my/our savings gearing loan.

Sign in accordance with authority on the bank account.

Signatory 1

Signatory 2

Full Name

Full Name

Signature and Date

Signature and Date

Common Seal (if applicable)

NOTE: Should your direct debit contribution fail, and we have not heard from you to cancel this loan, we will continue to deduct the monthly Savings Gearing contribution amount from your margin loan each month and will charge you interest on this amount at the standard variable interest rate.

Declaration

I/We confirm that the above details are true and correct and that I/We have read and understood the terms and conditions of the Savings Gearing Loan.

Borrower/Trustee/Director 1

Borrower/Trustee/Director 2

Full Name

Full Name

Signature and Date

Signature and Date

Common Seal (if applicable)

New Privacy laws protect your privacy. Please read our 'Protecting your privacy' brochure for more information.

Phone 1800 805 972 or ask at a branch to receive a copy.

Important: For a new Savings Gearing Loan, a completed Managed Fund Application and Managed fund investment form must also be include with this form.

Please send the completed form to:

Suncorp Margin Lending, Reply Paid 1877, Royal Exchange, NSW, 1225 OR Fax 1300 305 499.

Office Use Only

Direct Debit Start Date

/

/

CMA Account no. to Debit

Loan Number

Loan Name