

Managed Funds Investment.

Complete this form to make contributions towards your managed funds investment.

Section 1.

Please select one of the below:

- Make a new contribution to my managed funds.
- Make a subsequent contribution to my existing managed funds.
- Make an initial contribution to my managed funds for my Savings Gearing Loan – complete and attach a Savings Gearing Loan form.

Please also complete and attach your Managed Fund Application form for your choice of managed funds.

Section 2 – Borrower Details.

Borrower's Client Reference Number *(if known)*

Name of borrower(s) – *(exactly as it appears on the BankSA Margin Lending Application)*

If the Borrower is a Company or Trust please, specify the Company or Trust name

Section 3 – Contribution.

Name of Managed Fund/Master Trust	Your Contribution	Margin Loan Advance	Total Contribution Amount
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
	\$	\$	\$
Total Investment			\$

Section 4 – Method of Payment for your Contribution.

Please choose how you would like to pay for your contribution:

- Withdraw from my Cash Management Trust Account (CMA) (if applicable and providing there are sufficient available funds).
- Direct Debit my existing nominated account (if applicable).
- Direct Debit a new bank account – complete details in the Direct Debit section of this form.

Section 5 – Direct Debit Details.

This request is to enable BankSA Margin Lending (APCA User ID no. 432933) to deduct payments for your managed fund contribution.

By signing this request, I/we, the account holder(s) whose account is identified below, authorise you, BankSA 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 Request Service Agreement, a copy of this is available on our website banksa.com.au/marginlending.

Note: At least one of the Account holders must be a borrower under the Facility

Account name

Name of financial institution

Branch name

BSB number

Account number

Sign in accordance with authority on the bank account.

Full Name

Full Name

Signature

Signature

Date

Date

Section 6 – Declaration.

I/We confirm that the above details are true and correct.

Borrower/Trustee/Director 1

Full Name

Borrower/Trustee/Director 2

Full Name

Signature

Signature

Date

Date

Please send the completed form to:

BankSA Margin Lending
Reply Paid 1467
Royal Exchange NSW 1224
or email to
MLTRANSACT@stgeorge.com.au