

Complete this form to transfer margin loan(s) from another margin lender to BankSA Margin Lending.
If you are new to BankSA Margin lending, please complete and attach a BankSA Margin Lending Application form.

Please Note : The loan and refinance amount is subject to credit approval.

Section 1 Borrower Details

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

Client Reference number

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

Section 2 Details of Current Margin Lender

Name of your 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 BankSA Margin Lending on the borrower(s) facility

Current Holder Identification Number(s) HIN(s) – as appears on your CHESS statement

Is your loan with your current provider fixed?

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, BankSA Margin lending will endeavour to refinance closer to this date.

If no, BankSA Margin lending will endeavour to refinance as soon as possible.

Yes
 No

Yes
 No

Section 3 Refinance Request

Please indicate the type of refinance below:

- Full refinance from the above-mentioned 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 - BankSA 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

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

Attach an additional sheet if there is insufficient space.

Section 4 Declaration

I/We hereby authorise BankSA 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

____ / ____ / ____

Third Party Security Provider 1

Signature

X

Date

____ / ____ / ____

Borrower/ Trustee/Director 2

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:
BankSA Margin Lending. Reply Paid 1467, Royal Exchange NSW 1224.**