

## Change of Details Notification.

Complete this form to change your contact details with BankSA Margin Lending. It is important to have the most up to date details in the event we need to contact you regarding your account, which we will do either via phone, post, SMS or email.

### Questions?

If you have any questions regarding completing this form, please call us on 1300 304 065. Phone lines are available Mon – Fri from 8.00am – 5.00pm (Adelaide time).

### Section 1 – Borrower's details.

Borrower's Client Reference Number

Borrower's name

### Section 2 – Amend name of borrower, third party security provider or authorised representative.

Current name of: **(Please mark with an [ X ])**

- ☐ Individual borrower
- ☐ Individual third party
- ☐ Authorised representative

Title

Given name(s)

Surname




Current name of: **(Please mark with an [ X ])**

- ☐ Company or corporate trustee borrower
- ☐ Company or corporate trustee third party

### Individual change of name.

Please attach an original certified copy of marriage certificate or appropriate documentation indicating change of name by deed poll.

Title

New given name(s)

New surname




Old signature

New signature

### Company change of name.

Please provide your new company name and attach an original certified copy of Certificate of Change of Name (issued by ASIC).

Section 3 – Change of address and contact details.

The address and/or contact details being updated relate to: **(Please mark with an [ X ] and complete name of party selected)**

- ☐ Individual borrower or individual trustee borrower
- ☐ Individual third party security provider
- ☐ Authorised representative
- ☐ Company borrower or Corporate trustee borrower
- ☐ Company third party or Company third party trust security provider

Name

New residential address – a PO Box is not acceptable

Address

State

Postcode

New Mailing address – write “as above” if the same as your new residential address

(By instructing us to change your mailing address, you authorise us to change your mailing address for your Margin Loan, Holder Identification Number (HIN), CHESS, Cash Management Trust Account (CMA) and Managed Fund holdings, where applicable)

Address

State

Postcode

New Home Phone Number

( )

Please ensure you include the area code

New Work Phone Number

( )

Please ensure you include the area code

New Email Address

New Mobile Phone Number (this mobile number will also receive one-time passwords)

( )

## Section 4 – Signing section.

Borrower(s) is/are required to sign when any of the contact details changed relate to the borrower(s).

Third party security provider(s) is/are required to sign when the contact details changed relate to the third party. The borrower(s) is not required to sign in this instance.

Authorised representatives are required to sign when the contact details changed relate to the authorised representative. The borrower(s) is not required to sign in this instance.

**For Company or Company Trustee, Borrowers or Third Party Security providers, either two Directors, or one Director and the Secretary or the Sole Director and Secretary must sign. Please indicate your company capacity by marking the appropriate box below your signature.**

### Signature of Borrower

X

Date

/ /

Please print full name

**Company Officer:** please indicate company capacity

☐ Sole Director/Secretary **OR** ☐ Company Director

### Signature of Third Party Security Provider

X

Date

/ /

Please print full name

**Company Officer:** please indicate company capacity

☐ Sole Director/Secretary **OR** ☐ Company Director

### Signature of Authorised Representative

X

Date

/ /

Please print full name

### Signature of Additional Borrower

X

Date

/ /

Please print full name

**Company Officer:** please indicate company capacity

☐ Company Director **OR** ☐ Company Secretary

### Signature of Additional Third Party Security Provider

X

Date

/ /

Please print full name

**Company Officer:** please indicate company capacity

☐ Company Director **OR** ☐ Company Secretary

Please send the completed form to:  
BankSA Margin Lending  
Reply Paid 1467  
Royal Exchange NSW 1225

or email to:  
[MLTRANSACT@stgeorge.com.au](mailto:MLTRANSACT@stgeorge.com.au)

**The original Contact details amendments form must be sent to BankSA Margin Lending if changing an individual or company name.**