

**Complete this form if you wish to terminate your margin loan account with us.**

(If you wish to transfer your margin loan to another lender, please contact your lender. Submit this form after your refinance is complete.)

**Section 1 Borrower's Details**

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

Borrower(s) Client Reference Number

**Section 2 Withdrawal of securities (if any)**

Please tick (✓) as appropriate

**Shares**

Convert the remaining shares to issuer sponsored

or

Transfer the remaining stock to the following broker. (To do so, you must instruct your broker or margin lender, who will initiate this transaction.)

Broker name

HIN

**Managed Funds**

To redeem your managed funds, please complete and attach a Managed Funds Redemption Form, available on our website [banksamarginlending.com.au](http://banksamarginlending.com.au)

or

Transfer the managed funds into my/our names.

**Section 3 Withdrawal of available funds (if applicable)**

Please tick (✓) one of the following two options

**Pay to account** – give details below

Name of financial institution

Branch name

BSB number

Account number

Account name

**OR**

**Pay via cheque** – give details below

Name of payee

Address

Postcode

**Section 4 Repaying your Loan (if applicable)**

Please note that any outstanding loan balance (including accrued interest) must be repaid before we can action this request. Please log on to **banksamarginlending.com.au** or call us on 1300 304 065 to confirm this amount. Please indicate your method of payment to repay your loan:

- Cheque (Payable to BankSA Margin Lending) to be attached to this form
- Deposit cash into our bank account

**Account Name:** St.George Bank Margin Lending

**BSB:** 332 096    **Account Number:** 599 000 006

**Reference:** You must include your Client Reference Number

- Direct Debit your existing bank account (if applicable)
- Complete and attach a Direct Debit Request Form available at **banksamarginlending.com.au**

**Section 5 Reason for closure (optional)**

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

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Section 6 Authority**

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

By signing this form, you also authorise us to close your linked Cash Management Trust account (CMA), if applicable.

Borrower/Trustee 1 Signature

X

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Borrower/Trustee 2 Signature

X

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Third party security provider's signature 1

X

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Third party security provider's signature 2

X

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Company Borrower or Company Trustee**

In all cases, either two directors, one director and one secretary or the sole director/secretary must sign.

Company Directory signature

X

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Company Director/Secretary signature (if applicable)

X

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Authorised Signatory's Signature

X

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Please send the completed form to:

**BankSA Margin Lending**

**Reply Paid 1467**

**Royal Exchange NSW 1224**

**or fax to 1300 179 540 (International 61 2 9995 8292)**