

# Margin Lending Options Plan Application



St. George Bank - A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

Please also ensure you complete the Form of Acknowledgement and Statement of Position form. Please note: Before you can start using this feature, one of our Account Managers will contact you once your application has been approved.

## Borrower Details

Name of borrower(s) - *If the Borrower is a Trust or Company please specify the Company or Trust name*  
*Write the name of the borrower(s) exactly as it appears on the St. George Margin Lending Application*

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

## Broker/ACH Clearing Participant Details

Name of Broker\*/ACH Clearing Participant

Broker/ACH Clearing participant company

\* Stockbroker must be one of the St. George approved stockbrokers. A list of the approved stockbrokers for options trading can be located on our website [stgeorgemarginlending.com.au](http://stgeorgemarginlending.com.au)

## Declaration and Signing

By signing this application you acknowledge:

- having read and understood the Options Plan Terms and Conditions
- that the Options Plan Terms and Conditions are supplementary to the facility agreement that you have read and understood.

For companies, either two directors, one director and one secretary or the sole director must sign and executions are in accordance with S127 of the Corporations Act.

### First Borrower's Name

Full name

Office held (*if a company*)

First Borrower's Signature

Date

### First Third Party Security Provider

Full name

Office held (*if a company*)

Signature

Date

Common Seal (*if applicable*)

### Second Borrower's Name

Full name

Office held (*if a company*)

Second Borrower's Signature

Date

### Second Third Party Security Provider

Full name

Office held (*if a company*)

Signature

Date

Privacy laws protect your privacy. Please read our "Protecting Your Privacy" brochure for more information.

Phone 1300 304 065 (61 2 9236 3130)

or ask at a branch to receive a copy.



# Statement of Position



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## Section 1 Borrower Details

Account Number (if known) \_\_\_\_\_

Borrower's name(s) \_\_\_\_\_

\_\_\_\_\_

## Section 2 Financials

Assets	
Savings	\$
Property (residential)	\$
Property (investment)	\$
Shares/Managed funds	\$
Other	\$
<b>Total</b>	\$

Annual Income	
Salary (pre-tax)	\$
Rental and dividends (pre-tax)	\$
Other income (details)	\$
Other (details)	\$
<b>Total</b>	\$

Liabilities	
Mortgage (residential)	\$
Mortgage/Loans (investment)	\$
Leases	\$
Credit cards	\$
Other (details)	\$
<b>Total</b>	\$

Annual Expenditure	
Mortgage payments/Rent (residential)	\$
Mortgage/Loan payments (investment)	\$
Lease payment	\$
Credit card payments	\$
Living expenses and school fees	\$
Other expenses (details)	\$
<b>Total</b>	\$

## Section 3 Additional Requirements

Please attach the following documents for each borrower as appropriate:

- Individuals: Two recent payslips or latest two tax returns
- Companies: Two most recent years' financial statements.

## Section 4 Declaration and Signing

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

Borrower 1 full name \_\_\_\_\_

Borrower 2 full name \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_



Please send the completed form and relevant attachments to:  
 St. George Margin Lending  
 Reply Paid 1467  
 Royal Exchange NSW 1224  
 or fax to (02) 9236 3093