

Complete this form to transfer margin loan(s) from another margin lender to St.George Margin Lending.

If you are new to St.George Margin lending, please complete and attach a St.George Margin Lending Application form.

**Section 1
Borrower
Details**

Name of borrower(s) on the St.George Margin Lending Facility

Client Reference Number

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

**Section 2
Details of
Current
Margin Lender**

Name of 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 St.George Margin Lending on the borrower(s) facility

Current Holder Identification Number(s) HIN(s) – as they appear on your CHESSE statement

Is your loan with your current provider fixed?



- Yes
 No

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”, *St.George Margin Lending will endeavour to refinance closer to this date.*

If “No”, *St.George Margin Lending will endeavour to refinance as soon as possible.*



- Yes
 No

**Section 3
Refinance
Request**

Continued Overleaf.

Section 3 Please indicate type of refinance below:

Refinance Request

- Full refinance from the abovementioned 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
St. George 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

* Write "ALL" if you would like all your shares/units to be transferred.

Attach an additional sheet if there is insufficient space.

**Section 4
Declaration**

Continued Overleaf.

Section 4 Declaration I/We hereby authorise St.George 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

____ / ____ / ____

Borrower/Trustee/Director 2

Signature

X

Date

____ / ____ / ____

Third Party Security Provider 1

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:
St.George Margin Lending
Reply Paid 1467
Royal Exchange NSW 1224