

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.

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

## 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 CHESS 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.*



Yes  
 No

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

## 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<br>(if known) | Units* | Name of Holder of<br>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