

## Complete this form if you wish to:

- Update your Margin Lending payment instructions
- Change your nominated bank account

### 1. Client Details

|                      |                        |                      |
|----------------------|------------------------|----------------------|
| Username             | Trading account number | Trading account name |
| <input type="text"/> | <input type="text"/>   | <input type="text"/> |

### 2. Change/Add your Bank Account for Direct Debit/Credits

Select the type of change to your nominated bank account and provide the new bank account details below (select **ONE** option only):

- Change/add my bank account used for settlement of trades and for other amounts I/we must pay.
- Change my bank account linked to the funds in trust account.

|                      |                      |                      |
|----------------------|----------------------|----------------------|
| Account name         | BSB                  | Account number       |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

If the linked bank account has one or more parties which are not the share trading account holders, you **MUST** provide identification with a signature and ensure they sign the Declaration & Signature/s section of this form.

### 3. Third Party Settlement

- Third Party Settlement (*e.g. Margin Loan or WRAP Account*). By selecting this option your share trading transactions will be settled through a Third Party Settlement provider.

|  |  |
|--|--|
| Third party settlement provider (e.g. Margin Lender) | Third party settlement PID                   |
| <input type="text"/>                                 | <input type="text"/>                         |
| Third party account number                           | Third party settlement account name          |
| <input type="text"/>                                 | <input type="text"/>                         |
| Third party contact person – <i>if known</i>         | Third party contact number – <i>if known</i> |
| <input type="text"/>                                 | <input type="text"/>                         |

- Tick to cancel existing HIN. We cannot cancel until all holdings are removed, please ensure this has been completed before submitting this request.

## 4. Declaration & Signature/s

If you have requested a change to your nominated bank account for Direct Debit/Credit you declare the following:

I/We understand and acknowledge that:

- my/our financial institution has absolute discretion to decide the order in which it will pay moneys under this request, or any other request, authority or mandate;
- my/our financial institution has absolute discretion to refuse to honour this request at anytime;
- I/we may vary the amount or frequency of future debits to meet amounts payable under the Service;
- this request operates on the terms of the Direct Debit and Direct Credit Request Service Agreement contained in the Participant's Share Trading Terms and Conditions available from the trading site which I/we have read and agree to;
- I/we consent to the collection, use and exchange of my/our personal information as set out in the Customer Information and Privacy section of the Participant's Share Trading Terms and Conditions;
- the account details are correct and have been checked against a recent account statement from the nominated financial institution.

I/We authorise and request, the Participant (APCA ID. Direct Debit 093992, Direct Credit 093993) to arrange for funds to be debited from and credited to my/our account at the financial institution specified in this form and as prescribed below through the Bulk Electronic Clearing System (BECS).

This authorisation is to remain in force in accordance with the terms described in the Direct Debit and Direct Credit Request Service Agreement contained in the Participant's Share Trading Terms and Conditions available from the trading site.

I/We agree for the Participant to remit funds to my/our choice of nominated bank account.

I/We authorise and agree the following:

- The Participant to verify the details of the account recorded in this form with my/our financial institution;
- The financial institution to release information allowing the Participant to verify the account details mentioned in this form;
- To be sponsored by the Participant under the terms of the Participant Sponsorship Agreement. I/We have read and agree to accept and abide by the terms of the Agreement, and have been supplied with, read and understood the written explanation of the implications of those terms (as applicable).

All authorised signatories must sign this form for your instructions to be executed.

I/We authorise you to act in accordance with my/our instructions.

### Account Holder/Director/Secretary/Trustee 1

Full name  Date – DD/MM/YYYY  /  /

Signature – Must be signed pen to paper (with the exception of using DocuSign)

### Account Holder/Director/Secretary/Trustee 2

– If applicable

Full name  Date – DD/MM/YYYY  /  /

Signature – Must be signed pen to paper (with the exception of using DocuSign)


 If there are more than 2 authorised signatories, please photocopy this page, complete and attach to the form.



Australian Investment Exchange Limited ABN 71 076 515 930, AFSL 241400 (AUSIEX) is a wholly owned subsidiary of Nomura Research Institute, Ltd. (NRI). AUSIEX is a Market Participant of ASX Limited (ASX) and Cboe Australia Pty Ltd (Cboe), a Clearing Participant of ASX Clear Pty Limited and a Settlement Participant of ASX Settlement Pty Limited. All trading, clearing, settlement and CHESS sponsorship arrangements are held directly with AUSIEX.

## How to submit your documents

Once completed and signed, please scan and email the form to

 [support@sharetrading.netwealth.com.au](mailto:support@sharetrading.netwealth.com.au)

 **Netwealth**  
Locked Bag 3005  
Australia Square NSW 1215

 1800 888 223  
 [sharetrading.westpac.com.au](http://sharetrading.westpac.com.au)