



# NAB Margin Loan

## Request to close margin loan facility

Please complete Application form in full in black or blue pen using CAPITAL LETTERS and  where appropriate.

Send the completed form to: [equity.lending@nab.com.au](mailto:equity.lending@nab.com.au)

Attention

NAB Equity Lending contact name

### Facility details

Client/Facility name

Facility number

### Facility closure instructions

I/we wish to close my/our NAB Equity Lending Facility in accordance with the instructions provided by me/us below.

### Facility in debit

If your Facility has a debit balance:

- Debit my/our nominated bank account for the amount required (please ensure there are sufficient funds)
- Redeem the managed funds held in my/our facility (please also complete a Managed Fund Redemption Instruction form)
- I/we will sell shares held in my/our Facility

Name of financial institution

Name of account

BSB number

Account number

### Facility in credit

If your Facility has a credit balance:

- Credit the balance to my/our nominated bank account
- Credit the balance to the following bank account:

Name of financial institution

Name of account

BSB number

Account number

Important note: the bank account must be held in the borrower's name, and a recent bank statement must be provided for a non-NAB account.

### Transfer of ASX listed securities

If there are any ASX listed securities remaining in your Facility, please select one of the following options:

- Transfer securities out issuer sponsored
- Transfer all my securities (HIN) to another broker

Name of broker

Participant Identifier (PID)

Holder Identification Number (HIN)

### Transfer of managed funds

If there are managed funds remaining in your Facility, please advise that you wish us to transfer all managed fund investments from NMS Nominees Pty Ltd (ABN 62 088 233 792) into the name of the beneficial owner.

- Transfer all managed fund investments

## Applicant signatures

I/We consent to companies of the National Australia Bank Group using and disclosing my/our personal information as contemplated in the section titled Privacy Notification in the NAB Equity Lending Facility Terms.

I/we acknowledge that NAB does not provide any financial advice or recommendation about the Facility (including any specific stock or managed fund investment which may be accessed via the Facility). You should seek separate advice in relation to these matters if needed.

NAB recommends that you seek independent legal, tax and financial advice on the suitability of the Facility (including a product if relevant) for you.

### Individual/Joint

Signature – first applicant

Signature – second applicant

Full name

Full name

Date

Date

Contact number

Contact number

### Company applicant\*

Executed by

Name of company and ABN

in accordance with subsection 127 (1) of the Corporations Act by authority of its director(s).

Signature of authorised person

Signature of authorised person

Full name

Full name

Office held (Director/Secretary)

Office held (Director/Secretary)

Date

Date

Contact number

Contact number

\* If the company applicant is a proprietary company with a sole director who is also the sole company secretary, that person states that they sign as both the sole director and the sole company secretary. In all other cases, this application should be signed by two directors or a director and company secretary.