



# NAB Margin Loan

## Request to establish instalment gearing

Email 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

### Instalment gearing investment instructions

Your monthly instalments commence the month following approval (the initial advance is made on approval). Alternatively, please nominate the month you wish deductions to commence<sup>3</sup>.

Which managed fund(s) do you wish to invest in (this includes any existing managed funds you may have)?

Name of managed fund	Initial instalments <sup>1</sup>		Monthly instalments <sup>1,3</sup>		New managed fund <sup>4</sup>	Existing managed fund <sup>5</sup>
	Initial equity contribution <sup>2</sup>	Initial advance	Monthly equity contribution (minimum amount \$250)	Monthly loan component (minimum amount \$250)		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Total</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

1. Fund managers may impose investment minimums; please check the current offer document or contact the relevant fund manager(s). NAB Equity Lending minimums still apply. Please note your initial advance investment will be made upon approval.
2. Your initial equity contribution can be provided by cheque or direct debit from your nominated account.
3. The monthly loan components will be processed on the date invested by the fund manager, and monthly equity contributions on or about the 10th day of the month. The date the investment occurs is determined by the relevant fund manager.
4. New Managed Fund Investments: attach a completed and signed application from the relevant managed fund offer document.
5. Existing Managed Fund Investments: attach a copy of the most recent unitholder statement.

### Instalment gearing direct debit request – initial and monthly equity contributions

Please read the Direct Debit Request Service Agreement contained in the NAB Equity Lending Facility Terms before completing this request.

I/We request and authorise National Australia Bank Limited (the User) (User ID number 153106) to arrange for initial equity contributions and monthly equity contributions (as defined in NAB Equity Lending Facility Terms) to be debited through the Bulk Electronic Clearing System from an account held at the financial institution identified below subject to the terms and condition of the Direct Debit Service Agreement and the instructions provided by me/us below.

Name of financial institution

Address of financial institution

State

Postcode

### Details of account to be debited

Name of account

BSB number

Account number

## Acknowledgment

Before signing this Direct Debit Request you should read and understand the terms and conditions governing the direct debit arrangement between you and National Australia Bank Limited as set out in the Direct Debit Request Service Agreement in the NAB Equity Lending Facility Terms.

### Direct debit details

The account nominated may be debited for (tick relevant boxes):

- initial monthly equity contribution  
 monthly equity contribution

### Declaration

By signing this Direct Debit Request I/we declare that:

- this Direct Debit Request authorises National Australia Bank Limited to instruct the financial institution to debit the account (as described) on my/our behalf;
- all information given to National Australia Bank Limited is accurate and not misleading and that I/we are aware that National Australia Bank Limited is relying on it; and
- I/we will not alter the direct debit arrangements (including closing or changing the account described) set out in this Direct Debit Request without notifying National Australia Bank Limited at least 14 days prior to the next debit day due date.

## 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 National Margin Services Pty Ltd ('NMS') and NMS Nominees Pty Ltd ('Nominees') are wholly owned subsidiaries of National Australia Bank Limited (NAB). NMS and Nominees are not Authorised Deposit Taking Institutions and their obligations do not represent deposits or other liabilities of NAB. NAB does not guarantee the obligations or performance of NMS or Nominees or the products or services these subsidiaries offer.**

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).

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

Full name

Signature

Date

Contact number

Full name

Signature

Date

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).

Full name

Signature of authorised person

Date

Office held (Director/Secretary)

Contact number

Full name

Signature of authorised person

Date

Office held (Director/Secretary)

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.