



Email the completed form to: equity.lending@nab.com.au

Attention NAB Equity Lending contact name

Facility details

Client/Facility name

Facility number

Refinance from another margin lender

Please complete if you wish to transfer your existing margin loan to NAB Equity Lending. Please provide details of the securities and/or managed funds you wish to transfer to NAB Equity Lending.

Name of existing margin lender

Existing account details/number

Existing loan balance

Transfer existing shares and/or managed funds

Name in which shares/managed funds are registered:

Title

First given name

 Mr Mrs Ms Miss Other

Surname

Second given name

Participant sponsored shares (attach copies of most recent CHES statements)

Name of broker

Participant Identifier (PID)

Holder Identification Number (HIN)

Transfer HIN and all my/our CHES holdings

Transfer securities listed below from my existing Sponsoring Participant named above to National Margin Services Pty Ltd (ABN 81 088 233 872)

ASX code	Security name	Quantity

Managed funds (attach copies of most recent unit holder statements)

My/our website is active and accessible for navigation

APIR code	Name of managed fund	Quantity

Applicant signatures

I/We (or acting in capacity as Company Directors or trustee of a Trust) authorise the transfer of shares listed to National Margin Services Pty Ltd, and the managed fund investments to NMS Nominees Pty Ltd as required. I/We also authorise National Australia Bank Limited to pay out any outstanding loan against these shareholdings or managed fund holdings (if any).

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.

Note: If you are transferring your entire share portfolio and HIN to National Margin Services Pty Ltd, by authorising the transfer, your sponsorship agreement with the existing broker/margin lender will cease.

Individual/Joint

Full name

Full name

Signature

Date

Signature

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).

Full name

Full name

Signature of authorised person

Date

Signature of authorised person

Date

Office held (Director/Secretary)

Office held (Director/Secretary)

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.