

Please use blue or black pen and write in BLOCK letters

Send to: NAB Equity Lending  
PO Box 5350  
Melbourne VIC 3001

or Fax to: 1300 739 923

Attention  
NAB Equity Lending contact name

### Client Details

Client name

ATF

### Application/Investment Instructions

I/we request National Australia Bank Limited to purchase the investments listed in this loan request. I/we acknowledge that any investments acquired will become secured property under my/our NAB Super Lever Facility.

Investment Code (ASC <sup>1</sup> /APIR <sup>2</sup> Code)	Value of Investments to be purchased	SMSF cash contribution <sup>3</sup>	Loan amount required <sup>4,5</sup>	Direct Debit to pay loan interest (Y/N)	Guarantor security to be involved (Y/N) <sup>6</sup>
	\$	\$	\$		
	\$	\$	\$		
	\$	\$	\$		
<b>Total</b>	\$	\$	\$		

### Payment Details

NMS Nominees Pty Ltd is responsible for all transaction execution. All orders will be transacted at the prevailing market price after your SMSF contribution has been received as cleared funds.

**Total Funds to be provided from your SMSF:**

SMSF cash contribution

Estimate of Brokerage<sup>8</sup>

**Total**

### Investment Payment

I/we will pay the above total amount via:

- Direct Debit using the bank account nominated in my application  
 Cheque<sup>10</sup>

### Investment Attestation

- I/We (by ticking this box) confirm that the value of the requested *investments* (above), plus the value of any existing *investments* purchased via my/our NAB Super Lever Facility, DOES NOT EXCEED the net value of my/our SMSF assets.

Current net value of SMSF assets (to nearest \$'000):

- I/We confirm that my/our SMSF has NOT BORROWED to fund the SMSF cash contribution for this investment.

### Applicant Signatures

This form must be signed by the Applicant or their Authorised Representative.

Director 1/Sole Director/Trustee 1/Authorised Representative

Director 2/Sole Director/Trustee 2/Authorised Representative



Full Name

Full Name



Date

Date



Contact number

Contact number

## Application/Investment Instruction(s)

1. Due to movements in the share price of an ASX security, the transacted value may be below or above the value of *investments* nominated on this *loan request*.
2. If you want to purchase an unlisted managed fund, please complete the fund manager's application form and include it with your NAB Super Lever *loan request*.
3. The SMSF cash contribution for each transaction must be greater than or equal to:  $(1 - \text{security ratio of the investment}) \times \text{Value to be purchased}$ . For example: If the security ratio is 50%, and the desired purchase value is \$100,000 the minimum SMSF cash contribution must be \$50,000 or greater (ie:  $50\% \times \$100,000 = \$50,000$ ).
4. The total of any new *loans*, plus the total of any current *loans* under NAB Super Lever, must not exceed your *facility limit*. If you have elected to capitalise interest to the *loan*, the total of all *loans* plus capitalised interest must not exceed your *facility limit*. The minimum loan drawdown per transaction is \$20,000. Any breach of your facility limit is an event of default under the NAB Super Lever facility terms.
5. All *loans* will be variable rate *loans* unless you separately request us to provide you with a fixed rate *loan*. Please contact us if you wish to fix the interest rate on all or a portion of your *loan*.
6. *Approved investments* provided as part of a *guarantor's secured property* may decrease the minimum cash contribution required from your SMSF. Please contact NAB Equity Lending if you intend to have a *guarantor* provide any *secured property*.
7. If you would like the acquired *investments* to be associated with an investment platform or administration service, please contact NAB Equity Lending to discuss which (if any) platforms are currently approved to integrate with a NAB Super Lever Facility.
8. Any brokerage costs will be added to your loan if you choose not to pay for them up front.
9. Table converting an estimate of brokerage at 0.165% (incl. GST) into dollars:

Total ASX Transaction Value	Minimum Processing Fee	Total ASX Transaction Value	Minimum Processing Fee	Total ASX Transaction Value	Minimum Processing Fee
\$30,000	\$49.50	\$190,000	\$313.50	\$350,000	\$577.50
\$40,000	\$66.00	\$200,000	\$330.00	\$360,000	\$594.00
\$50,000	\$82.50	\$210,000	\$346.50	\$370,000	\$610.50
\$60,000	\$99.00	\$220,000	\$363.00	\$380,000	\$627.00
\$70,000	\$115.50	\$230,000	\$379.50	\$390,000	\$643.50
\$80,000	\$132.00	\$240,000	\$396.00	\$400,000	\$660.00
\$90,000	\$148.50	\$250,000	\$412.50	\$410,000	\$676.50
\$100,000	\$165.00	\$260,000	\$429.00	\$420,000	\$693.00
\$110,000	\$181.50	\$270,000	\$445.50	\$430,000	\$709.50
\$120,000	\$198.00	\$280,000	\$462.00	\$440,000	\$726.00
\$130,000	\$214.50	\$290,000	\$478.50	\$450,000	\$742.50
\$140,000	\$231.00	\$300,000	\$495.00	\$460,000	\$759.00
\$150,000	\$247.50	\$310,000	\$511.50	\$470,000	\$775.50
\$160,000	\$264.00	\$320,000	\$528.00	\$480,000	\$792.00
\$170,000	\$280.50	\$330,000	\$544.50	\$490,000	\$808.50
\$180,000	\$297.00	\$340,000	\$561.00	\$500,000	\$825.00

10. If you choose to deliver your *loan contribution* or other payments by cheque, it must be made payable to yourself; eg. XYZ Pty Ltd ATF <ABC Super Fund>, and marked non negotiable. Cheques must clear before your *loan request* with be executed.

Words written in italics have the same meaning as those in clause 67 of the NAB Super Lever Facility Terms.

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Melbourne VIC 3001

or Fax to: 1300 739 923

Attention  
NAB Equity Lending contact name

JOHN SMITH

### Client Details

Client name

JANE JONES

ATF

<ABC SAMPLE PTY LTD ATF ABC SAMPLE TRUST>

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BHP	\$100,000	\$50,000	\$50,000	Y	N
	\$	\$	\$		
	\$	\$	\$		
<b>Total</b>	\$	\$	\$		

### Payment Details

NMS Nominees Pty Ltd is responsible for all transaction execution. All orders will be transacted at the prevailing market price after your SMSF contribution has been received as cleared funds.

Total Funds to be provided from your SMSF:

SMSF cash contribution

\$50,000

Estimate of Brokerage<sup>8</sup>

\$165

Total

\$50,165

### Investment Payment

I/we will pay the above total amount via:

- Direct Debit using the bank account nominated in my application  
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### Investment Attestation

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Current net value of SMSF assets (to nearest \$'000):

\$500,000

- I/We confirm that my/our SMSF has NOT BORROWED to fund the SMSF cash contribution for this investment.

### Applicant Signatures

This form must be signed by the Applicant or their Authorised Representative.

Director 1/Sole Director/Trustee 1/Authorised Representative



Full Name

Date

/ /

Contact number

Director 2/Sole Director/Trustee 2/Authorised Representative



Full Name

Date

/ /

Contact number

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