

St.George Margin Lending – Change of Details Notification

Complete this form to change your contact details with St.George Margin Lending. It is important to have the most up-to-date details in the event we need to contact you regarding your account, which we will do either via phone, post, SMS or email.

Questions?

If you have any questions regarding completing this form, please call us on 1300 304 065. Phone lines are available Mon – Fri from 8.30am - 5.30pm (Sydney time)..

Section 1 – Borrower's details

Borrower's Client Reference Number

Borrower's name

Section 2 – Amend name of Borrower, Third Party Security Provider or Authorised Representative

Current name of: **(Please mark with an [X])**

- ☐ Individual Borrower
- ☐ Individual Third Party
- ☐ Authorised Representative

Title

Given name(s)

Surname

Current name of: **(Please mark with an [X])**

- ☐ Company or Corporate Trustee Borrower
- ☐ Company or Corporate Trustee Third Party

Individual change of name

Please attach an original certified copy of marriage certificate or appropriate documentation indicating change of name by deed poll.

Title

New given name(s)

New surname

Old signature

New signature

Company change of name

Please provide your new company name and attach an original certified copy of Certificate of Change of Name (issued by ASIC).

New company name

Section 3 – Change of address and contact details

The address and/or contact details being updated relate to: **(Please mark with an [X] and complete name of party selected)**

- ☐ Individual Borrower or Individual Trustee Borrower
- ☐ Individual Third Party Security Providerr
- ☐ Authorised Representative
- ☐ Company Borrower or Corporate Trustee Borrower
- ☐ Company Third Party or Company Trustee Borrower

Name

New residential address – a PO Box is not acceptable

Residential address

State

Postcode

New mailing address – write “as above” if the same as your new residential address

(By instructing us to change your mailing address, you authorise us to change your mailing address for your Margin Loan, Holder Identification Number (HIN), CHESS, Cash Management Trust Account (CMA) and Managed Fund holdings, where applicable)

Mailing address

State

Postcode

New home phone number

Please ensure you include the area code

New work phone number

Please ensure you include the area code

New email address

New mobile phone number (this mobile number will also receive one-time passwords)

Section 4 - Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at stgeorge.com.au/privacy/privacy-statement or by calling us on 13 33 30. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your application or request.

Section 5 – Signing section

Borrower(s) is/are required to sign when any of the contact details changed relate to the borrower(s).

Third Third Party Security Provider(s) is/are required to sign when the contact details changed relate to the third party.
The Borrower(s) is not required to sign in this instance.

Authorised Representatives are required to sign when the contact details changed relate to the Authorised Representative.
The Borrower(s) is/are not required to sign in this instance.

For Company/Company Trustee Borrowers and/or Third Party Security Providers, either two Directors, or one Director and the Secretary or the Sole Director and Secretary must sign. Please indicate your company capacity by marking the appropriate box below your signature.

Signature of Borrower

X

Date

/ /

Please print full name

Company Officer: please indicate company capacity

☐ Sole Director/Secretary **OR** ☐ Company Director

Signature of Third Party Security Provider

X

Date

/ /

Please print full name

Company Officer: please indicate company capacity

☐ Sole Director/Secretary **OR** ☐ Company Director

Signature of Authorised Representative

X

Date

/ /

Please print full name

Signature of Additional Borrower

X

Date

/ /

Please print full name

Company Officer: please indicate company capacity

☐ Sole Director/Secretary **OR** ☐ Company Director

Signature of Additional Third Party Security Provider

X

Date

/ /

Please print full name

Company Officer: please indicate company capacity

☐ Sole Director/Secretary **OR** ☐ Company Director

Please send the completed form to:
St.George Margin Lending
Reply Paid 1467, Royal Exchange NSW 1225

or email to:

MLTRANSACT@stgeorge.com.au

**The original Contact details amendments form must be sent to St.George Margin Lending
if changing an individual or company name.**