

# Nominated Financial Adviser Form

Complete this form to add/change or remove an adviser on your current margin loan facility.

## Questions?

If you have any questions, please contact your Adviser or our Account Management Team on 1300 304 065, 8.30am - 5.30pm (Sydney time) Monday to Friday.

## 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](http://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 1 - Borrower(s) details

Name of borrower(s) on the St.George Margin Lending Facility

Borrower(s) Client Reference Number

## Section 2 - Adviser request

I/We request you to (please tick (✓) one)

- Add a financial adviser to my/our margin loan account. Please complete Sections 4 and 5.
- Change the financial adviser on my/our margin loan account. Please complete Sections 3, 4 and 5.
- Remove the existing financial adviser from my/our margin loan account. I/We do not want to assign a new financial adviser. Complete Sections 3 and 5 only. *Please note the financial adviser being removed from the account is not required to sign Section 5.*

## Section 3 - Existing adviser details

Name of financial adviser

AFS Licensee name

AFS Licence no.

Dealer group

## Section 4 - New adviser details

Full name

Financial adviser company

AFS Licence no.

Dealer group

ABN

## Section 4 - New adviser details (continued)

Mailing address

Phone number

Mobile phone number

Email address

Would you like your financial adviser to receive a copy of your margin lending statement and to receive or access information in connection with your facility or, in relation to a managed investment scheme, provide us with instructions in relation to that managed investment scheme?



Yes  
 No

## Section 5 - Declaration and signing

By signing this form, I/we agree that:

- I/we authorise the person identified as the New Adviser in Section 4 to act on my/our behalf in relation to my/our margin lending facility.

**For company or company trustee borrowers, either two directors, or one director and the secretary OR the sole director and the secretary must sign. Indicate your company capacity by marking the appropriate box below your signature.**

Signature of financial adviser

Full Name of financial adviser (please print)

Date

Signature of borrower 1

Full Name of borrower 1

Director  Sole Director and Secretary

Date

Signature of borrower 2

Full Name of borrower 2

Director  Company Secretary

Date

**Please send the completed form to:**  
**St. George Margin Lending**  
**Reply Paid 1467. Royal Exchange NSW 1224**  
**or email to:**  
**[MLTRANSACT@stgeorge.com.au](mailto:MLTRANSACT@stgeorge.com.au)**