

# Account Closure Request



St.George Bank - A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

Complete this form if you wish to terminate your margin loan account with us.

(If you wish to transfer your margin loan to another lender, please contact your lender. Submit this form after your refinance is complete.)

## Section 1 Borrower's Details

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

Borrower(s) Client Reference Number

## Section 2 Withdrawal of securities (if any)

Please tick (✓) as appropriate

### Shares

Convert the remaining shares to issuer sponsored

or

Transfer the remaining stock to the following broker. (To do so, you must instruct your broker or margin lender, who will initiate this transaction.)

Broker name

HIN

### Managed Funds

To redeem your managed funds, please complete and attach a Managed Funds Redemption Form, available on our website [stgeorgemarginlending.com.au](http://stgeorgemarginlending.com.au)

or

Transfer the managed funds into my/our names.

## Section 3 Withdrawal of available funds (if applicable)

Please tick (✓) one of the following two options

Pay to account - give details below

Name of financial institution

Branch name

BSB number

Account number

Account name

OR

Pay via cheque - give details below

Name of payee

Address

Post Code

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## Section 4 Repaying your Loan (if applicable)

Please note that any outstanding loan balance (including accrued interest) must be repaid before we can action this request. Please log on to [stgeorgemarginlending.com.au](http://stgeorgemarginlending.com.au) or call us on 1300 304 065 to confirm this amount.

Please indicate your method of payment to repay your loan:

- Cheque (*Payable to St.George Margin Lending*) to be attached to this form
- Deposit cash into our bank account

**Account Name:** St.George Bank Margin Lending

**BSB:** 332 096 **Account Number:** 599 000 006

**Reference:** You must include your Client Reference Number

- Direct Debit your existing bank account (*if applicable*)
- Complete and attach a Direct Debit Request Form available at [stgeorgemarginlending.com.au](http://stgeorgemarginlending.com.au)

## Section 5 Account Closure

Please note that you can leave your St.George Margin Lending Facility open with a nil balance and with or without security lodged. There is no ongoing cost to you.

This means that if in the future you decide that a St.George Margin Lending Facility fits within your wealth creation strategy, you can start using your account immediately. You do not have to worry about re-applying for a loan and having to provide your financial details.

I would like to:

*(Please tick one box only. Where no selection is made, your St.George Margin Lending Facility will remain open.)*

- Keep my St.George Margin Lending Facility open
- Terminate my St.George Margin Lending Facility

## Section 6 Customer Insight

Your feedback is important to us. In order to continually improve our products and client services, we would appreciate your feedback on your reasons for repaying and/or terminating your St.George Margin Lending Facility?

*(You may select more than one reason where appropriate)*

- Product features (i.e. extent of approved securities and their corresponding LVRs, online transaction functionality, etc)
- Cost of margin loan (i.e. interest rate too high)
- Financial adviser recommendation
- I am refinancing to another margin loan provider
- I will be using alternative funding sources (i.e. home equity loan, overdraft, etc)
- My risk appetite has changed and margin lending no longer forms part of my wealth strategy
- Other: *(Please comment)*

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Any suggestions or comments on how we can improve our St.George Margin Lending products and services?

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I would like St.George Margin Lending to continue to send me Westpac Group promotions and offers either via mail, email or telephone from time to time.

- Yes  No

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## Section 7 Signing Section

Where any of these securities are owned by a third party (i.e. not the borrower(s)), the third party security provider is also to sign here.

For Company or Company Trustee Borrowers 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 1

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Signature of Borrower 2

\_\_\_\_\_

Signatory's Full Name

\_\_\_\_\_

Signatory's Full Name

\_\_\_\_\_

Director  Sole Director & Secretary

Director  Company Secretary

Signature of Third Party Security Provider 1

\_\_\_\_\_

Signature of Third Party Security Provider 2

\_\_\_\_\_

Signatory's Full Name

\_\_\_\_\_

Signatory's Full Name

\_\_\_\_\_

Director  Sole Director & Secretary


Director  Company Secretary

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

Date

\_\_\_\_ / \_\_\_\_ / \_\_\_\_

  
Please send the completed form to:  
St.George Margin Lending  
Reply Paid 1467  
Royal Exchange NSW 1224  
or fax to 1300 179 540