



# Westpac Margin Lending Loan Refinance Form

Use this form to transfer your existing margin loan to Westpac Margin Lending, for either a full or partial refinance.

**Note:** The Westpac margin loan facility and refinance amount is subject to credit approval.

## Questions?

If you have any questions regarding completing this form, please call us on 1800 816 222.

Phone lines are available Mon – Fri from 8.30am – 5.30pm (Sydney time).

## Do you have an existing Westpac Margin Loan?

Tick [✓] appropriate box:

Yes ▶ Complete section 1

No ▶ Complete section 2. You will also need to complete the Westpac Margin Lending Loan Application Form.

## 1. Borrower's details

Borrower's name(s)

Borrower's client code

## 2. Details of loan to be refinanced

Name of existing margin lender

Full name of existing loan to be refinanced

Account number of existing margin loan

Name of third party security provider(s) (if applicable)

**Note:** *Third party security provider(s) must be registered with Westpac Margin Lending*

Is your loan with your current provider fixed?

Yes  No

If "Yes":

1. What is the maturity date?

2. Do you want your refinance to take place on or as near as possible to the above maturity date?

*(Must be maturing within 30 days)*

Yes  No

If "Yes", we will endeavour to refinance closer to the above date.

If "No", we will endeavour to refinance as soon as possible.



DEC11W11769E

**3. Full or partial refinance**

**Full refinance**

You wish to transfer your entire margin lending portfolio to Westpac Margin Lending.

- I/We authorise our existing margin lender (named above) to provide Westpac Margin Lending with any and all information regarding my/our margin lending account.
- I/We authorise our existing margin lender (named above) to transfer my/our CHESS HIN and managed fund holdings to Westpac Margin Lending.
- I/We authorise Westpac Margin Lending to pay out any outstanding loan(s) against these securities, if any.

**OR**

**Partial refinance**

You wish to transfer a portion of your margin lending portfolio to Westpac Margin Lending.

Indicate loan value

\$

- I/We authorise our existing margin lender (named above) to transfer the stocks or managed funds listed below to Westpac Margin Lending.
- I/We authorise Westpac Margin Lending to pay out any outstanding loan against these securities, if any.

**1. Partial refinance**

Name of security

Quantity *(Number of shares or units)*

Name security is registered in

**2. Partial refinance**

Name of security

Quantity *(Number of shares or units)*

Name security is registered in

**3. Partial refinance**

Name of security

Quantity *(Number of shares or units)*

Name security is registered in

**4. Partial refinance**

Name of security

Quantity *(Number of shares or units)*

Name security is registered in

**5. Partial refinance**

Name of security

Quantity *(Number of shares or units)*

Name security is registered in

**6. Partial refinance**

Name of security

Quantity *(Number of shares or units)*

Name security is registered in



DECIXIW11769E

**3. Full or partial refinance (continued)**

**7. Partial refinance**

Name of security

Quantity (Number of shares or units)

Name security is registered in

**8. Partial refinance**

Name of security

Quantity (Number of shares or units)

Name security is registered in

**4. Declaration and signatures**

Where any of the securities to be refinanced are owned by a third party (i.e. not the borrower), the third party security provider is also to sign this section.

**For Company or 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. Indicate your company capacity by marking the appropriate box below your signature.**

Signature of **Borrower**

Signatory's full name (please print)

Director  Sole Director and Secretary

Date

Signature of **Additional Borrower**

Signatory's full name (please print)

Director  Company Secretary

Date

Signature of **Third Party Security Provider**

Signatory's full name (please print)

Director  Sole Director and Secretary

Date

Signature of **Additional Third Party Security Provider**

Signatory's full name (please print)

Director  Company Secretary

Date

**You can submit this form by:**

🏠 Westpac Margin Lending  
GPO Box 3917, Sydney NSW 2001

✉ [mltransact@westpac.com.au](mailto:mltransact@westpac.com.au)



DECIXIW11769E