



# Westpac Margin Lending Nominated Financial Adviser

Complete this form to add/change or remove a financial adviser on your Westpac Margin Loan facility.

## 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).

## Privacy Statement – Financial Adviser

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Third Party Privacy Notice which is available at [westpac.com.au/privacy/supplementary-notices/third-party-notice/](http://westpac.com.au/privacy/supplementary-notices/third-party-notice/). Our Third Party Privacy Notice 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.

## 1. Borrower's details

Borrower's name's

Borrower's Client Code

## 2. Financial Adviser request

I/We request to: (please tick  one option below)

- Add a financial adviser to my/our Westpac Margin Loan account. Please complete Sections 4 and 5 of this form.
- Change the financial adviser on my/our Westpac Margin Loan account. Please complete Sections 3 to 5.
- Remove the existing financial adviser from my/our Westpac Margin Loan account. I/We do not want to assign a new financial adviser. Complete Sections 3 and 5 only.

## 3. Existing Financial Adviser details

Name of Financial Adviser

AFSL No.

Dealer Group



DECI11W33190

**4. New Financial Adviser details (complete this section with your Financial Adviser)**

Title:  Mr  Mrs  Miss  Ms Other

Given name(s) (include first and middle names)

Surname

Name of Dealer Group

Financial Adviser's Company name (if applicable)

AFSL No.

ABN

Margin Lending Adviser No. (if applicable)

Adviser mailing address

Adviser email address\*

\*We may elect to email correspondence to you

Work phone number

Mobile phone number

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



## 5. Signing section

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**

*(Not required where you are removing an existing financial adviser and not appointing a new one)*

Date

X

/ /

Full name of **Financial Adviser**

*(Not required where you are removing an existing financial adviser and not appointing a new one)*

Signature of **Borrower 1**

Date

X

/ /

Full name of **Borrower 1**

Director  Sole Director and Secretary

Signature of **Borrower 2**

Date

X

/ /

Full name of **Borrower 2**

Director  Company Secretary

Financial adviser stamp (including AFSL number)

**You can submit this form by:**

🏠 Westpac Margin Lending  
GPO Box 3917, Sydney NSW 2001

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

