



# Westpac Margin Lending Separately Managed Accounts (SMA) – Additional Investment Form

Use this form to authorise Westpac Margin Lending to make additional investments into your Praemium SMA account. Westpac Margin Lending will transfer a specified sum to your Praemium SMA account. The additional investment will occur on the next available date for investment, once the funds have been received.

**Note:** The minimum additional investment amount is \$500.

## Questions?

If you need help completing this form, please call us on 1800 816 222. Phone lines are available Mon – Fri from 8.30am – 5.30pm (Sydney time).

## 1. Borrower's details

Borrower's name(s)

Borrower's Client Code

Praemium SMA account number

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## 2. Additional investment instructions

You can choose to instruct Westpac Margin Lending to debit a specified amount from your nominated bank account and draw down funds from your loan for a total additional investment amount.

**Debit the nominated bank account for a one-off amount**  
The amount specified will be debited from your nominated bank account

**Draw down from my Westpac Margin Loan**  
The amount specified will be drawn from your margin loan. This will increase your loan balance.

**Total additional investment**

Amount
\$
\$
\$

**Note:** The amount drawn from your margin loan is subject to approval and you must have sufficient funds available for the total additional investment amount.



### 3. Signing section

The borrower(s) is/are required to sign this form.

**For Company or Company Trustee account holders, 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**

X

Date

/ /

Signatory's full name *(please print)*

Director  Sole Director/Sole Secretary

Signature of **Borrower 2**

X

Date

/ /

Signatory's full name *(please print)*

Director  Company Secretary

**You can submit this form by:**

🏠 Westpac Margin Lending  
GPO Box 3917, Sydney NSW 2001

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

