



# Westpac Margin Lending Separately Managed Accounts (SMA) – Regular Gearing

Use this form to amend, suspend or cancel regular gearing into your Praemium SMA account.

## 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

|   |   |   |  |  |  |  |  |  |  |  |  |  |
|---|---|---|--|--|--|--|--|--|--|--|--|--|
| S | M | A |  |  |  |  |  |  |  |  |  |  |
|---|---|---|--|--|--|--|--|--|--|--|--|--|

### 2. Amend regular gearing

Indicate the change you would like to make to your SMA account regular gearing amount. Changes to regular gearing and direct debits must be made at least 10 days prior to the next regular gearing date. The regular gearing date is the 15th of each month, or if this falls on a non-working day, then the next working day.

**Change the total amount invested each month (combined direct debit amount and loan amount) to your SMA account.**

**Note:** This change will occur from the next regular gearing date. The minimum amount to be invested is dependent on the SMA you are invested in as set out in the relevant PDS.

|                                 |           |
|---------------------------------|-----------|
| Direct debit monthly amount     | \$        |
| Loan monthly amount             | \$        |
| <b>Total monthly investment</b> | <b>\$</b> |

**Note:** We may terminate the regular gearing arrangement at any time if we consider that a loan contribution may result in the amount outstanding under your facility exceeding either your borrowing limit or your credit limit.

### 3. Suspend or cancel

**Suspend Regular Gearing**

**Note:** This is always on the 15th of each month, or if this falls on a non-working day, then the next working day.

**Cancel Regular Gearing**

**Note:** This will cancel your direct debit and regular investment.

|                             |    | Month | Year |
|-----------------------------|----|-------|------|
| Cease regular gearing from* | 15 | /     | /    |
| Start regular gearing from  | 15 | /     | /    |

\* Stops your direct debit and investment for the period, including months indicated.



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#### 4. Signing section

I/We confirm the above details are true and correct.

**For Company or Company Trustee, or Borrowers, 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.**

By signing this form you authorise Westpac Margin Lending to facilitate the above matters and instruct the responsible entity for the SMA as necessary.

Signature of **Borrower**

Date

X

/ /

Signatory's full name *(please print)*

Director  Sole Director/Sole Secretary

Signature of **Additional Borrower**

Date

X

/ /

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)

