

If you have any questions please contact our Account Management Team on 1800 805 972 Intl 612 9236 3471, between 8am – 6pm Sydney time Monday to Friday.

Please complete this form to add/change or remove an adviser on your current margin loan facility.

NOTE: Nominated advisors may not receive margin calls on your behalf without a tri party agreement.

Section 1 Borrower's Details

Name of Borrower/s on the Suncorp Bank Margin Lending Facility

Borrower/s Client Reference Number

Section 2 Adviser Request ☑ Please tick one of the following options

I/We request you to: *(Please select one)*

- 1. Add an Adviser to my/our margin loan account
- 2. Change the Adviser on my/our margin loan account
- 3. Remove the existing Adviser from my/our margin loan account

Section 3 Existing Adviser Details

Name of Adviser

AFS Licence Name

AFS Licence Number

Dealer Group

Section 4 New Adviser Details

Name of Adviser

Date of Birth

Title Mr Mrs Ms Miss Dr Other

DD / MM / YY

Given Name/s *(in full)*

Adviser Company

AFS Licence Number

Dealer Group

ABN

Mailing Address

Suburb

State

Country

Postcode

Home Phone Number

Work Phone Number

Mobile Phone Number

Email Address

Fax Number

**Please send the completed form and certified copies of the relevant identification to:
Suncorp Bank Margin Lending, Reply Paid 1877, Royal Exchange NSW 1225 OR Fax to 1300 305 499 Intl 612 9995 8227.**

Section 5 Statements
 Please tick

Would you like a copy of your margin lending statement sent to your adviser?

 YES NO
Section 6 Authorised Signatory
 Please tick

Would you like your adviser to be your Authorised Signatory?

 YES NO

If 'YES', your adviser must complete the rest of this section.

If 'NO', please go to Declaration.

By saying 'YES' you give your Adviser the authority to act on your margin lending facility in all matters as if they were you. You must notify us immediately if you wish to revoke this authority at any time.

Have you, the Adviser, already provided Suncorp Bank Margin Lending your Proof of Identity?

 YES NO

If 'YES', please go to Declaration.

If 'NO', please complete details below.

Relationship to Borrower/s

Date of Birth*

	DD / MM / YY
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Residential Address

(PO BOX NOT ACCEPTABLE)

Suburb

State

Country

Postcode

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Please provide us with a certified copy of the adviser's identification as per the Proof of Identity Requirements.

Proof of identity requirements

Each Authorised Signatory must attach a certified copy of one form of personal identification as indicated below:

- 1. Australian/State Territory driver's licence containing a photograph of the person
- 2. A current Australian Passport (or one that has expired within the previous 2 years)
- 3. Card issued under State/Territory for the purpose of proving a person's age, containing a photograph of the person
- 4. Foreign passport or similar travel document containing a photograph and signature of the person*

*Documents must be written substantially in English.

NOTE: The identification provided must contain the individual's FULL NAME, and either RESIDENTIAL ADDRESS (not a PO Box) or DATE OF BIRTH.

If you are unable to provide one of the forms of identification detailed above, please contact our Account Management Team on 1800 805 972 for further options.

Section 7 Privacy Statement

Suncorp-Metway Limited is a member of the Suncorp Group.
The Privacy Act 1988 (Cth) requires us to inform you that:

Purpose of collection

Personal information is information about an identifiable individual and includes facts or an opinion about you which identifies you or by which your identity can be reasonably determined. The collection of your personal information is essential to enable us to conduct our business of offering and providing you with our range of financial products and services.

We collect personal information for the purposes of:

- identifying and protecting you when you do business with us;
- establishing your requirements and providing the appropriate product or service;
- setting up, administering and managing our products and services;
- assessing and investigating, and if accepted, managing a claim made by you under one or more of our products; and
- training and developing our staff and representatives

We may be required by law to collect your personal information. These include, but are not limited to, anti-money laundering and taxation laws.

Consequences if personal information is not provided

If we request personal information about you and you do not provide it, we may not be able to provide you with the financial product or service that you request, or provide you with the full range of services we offer.

Disclosure

We use and disclose your personal information for the purposes we collected it.

We may also use and disclose your personal information for a secondary purpose that is related to the purpose for which we collected it. This would happen in cases where you would reasonably expect us to use or disclose your personal information for that secondary purpose.

In the case of sensitive information, any secondary purpose, use or disclosure will be directly related to the purpose of collection.

When necessary and in connection with purposes of collection, we may disclose your personal information to and/or collect your personal information from:

- other companies within the Suncorp group;
- where required or authorised under our relationship with our joint venture companies;
- information technology providers, including hardware and software vendors and consultants such as programmers;
- research and development service providers;
- your advisers, agents or representatives;
- our advisers, agents or representatives;
- if required or authorised to do so, regulatory bodies and government agencies;
- financial advisers;
- lenders' mortgage insurers and valuers;
- credit reporting agencies;
- legal and other professional advisers;
- printers and mail house service providers;
- manufacturers for plastic card production (e.g. debit and credit cards);
- external dispute resolution schemes

Disclosure overseas

There are also instances where we may have to send your personal information overseas or collect personal information from overseas. These instances include:

- sending your personal information to companies in the Suncorp group;
- when you have asked us to do so;
- when we are authorised or required by law to do so;
- when we have outsourced a business activity or function to an overseas service provider with whom we have a contractual arrangement;
- certain electronic transactions; or
- when it is necessary in order to facilitate a transaction on your behalf.

We will only send your personal information overseas or collect personal information about you from overseas for the purposes in this statement.

Access

You can request access to the personal information we hold about you by contacting us.

In some circumstances, we are able to deny your request for access to personal information. If we deny your request for access, we will tell you why.

If accessing your personal information will take an extended period of time, we will inform you of the likely delay. For more detailed requests for access to personal information, for example, access to information held in archives, a fee may be charged to cover the associated cost of retrieval and supplying this information.

Marketing

We would like to use and disclose your personal information to keep you up to date with the range of products and services available from Suncorp. Generally, our companies in the Suncorp group will use and disclose your personal information for Suncorp's marketing purposes.

If you do not want us to use and disclose your personal information for the purpose of marketing products and services to you, you should contact us and tell us.

Contact

Please contact us to:

- change your mind at any time about receiving marketing material;
- request access to the personal information we hold about you; or
- obtain more information about our privacy practices by asking for a copy of our Privacy Policy;

You can contact us by calling 13 11 75 or contacting us at suncorpbank.com.au or by visiting any of our branches.

Our Privacy Policy can also be found on our website at suncorpbank.com.au at the bottom of the page by clicking on "Privacy".

Section 8 Nominated Adviser Signing Section

I confirm that the details provided are true and correct.

I acknowledge I have read and accepted the Suncorp Bank Privacy Statement and Consent.

I agree to Suncorp transmitting my/our personal information by electronic means as well as contacting me by SMS Messaging and/or E-Mail regarding my account where I have included my mobile telephone number or E-Mail address as part of this application. I accept that there is a risk that information may come into the possession of another person not entitled to receive it and acknowledge that while Suncorp will take all reasonable steps to protect my privacy, it accepts no liability for breach of confidentiality or damages for loss I might suffer provided Suncorp can show it communicated to me at the electronic address or number provided by me.

Financial Adviser

Signature

Full Name

Date

Privacy preference – would you like the benefit of receiving information about products and services (which may be supplied by us, other members of the Suncorp Metway Group or preferred providers) which we consider may be of value and interest to you?
Please note if you have not ticked any boxes you will be taken to have said YES.

YES NO

Section 9 Declaration

I/We authorise the person/s identified as the New Adviser in Section 4 to act on my/our behalf in relation to my/our margin lending facility.

I/We authorise the revocation and/or changes to my/our existing Adviser as identified in this form.

Borrower 1/Trustee 1/Director 1
Borrower 2/Trustee 2/Director 2 or Secretary

For Company or Company Trustee Borrowers, either two directors, one director and one secretary or the sole director/secretary must sign.

Signature

Full Name

Date

Signature

Full Name

Date