

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 set up a new Savings Gearing Loan or amend/cancel your existing Savings Gearing Loan.

NOTE: Not all managed funds or master trusts, allow regular contributions. Minimum initial investments and minimum monthly investments may apply and any margin loan advance is subject to your borrowing limit and credit limit. Ask your adviser or fund manager for details.

Section 1 Borrower's Details

Borrower/s Name *(exactly as it appears on the Suncorp Bank Margin Lending Application)*

If the borrower is a Trust or Company please specify the Company or Trust name

Borrower/s Client Reference Number *(if known)*

Section 2 Savings Gearing Loan Limit

The Savings Gearing Loan will continue until we receive a written authority from you to cancel this plan or 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. You can set a limit at any time by contacting our Account Management Team on 1800 805 972.

Section 3 Initial Investment

If you wish to make an initial contribution to your specified Managed Fund Investment/s, please complete and attach the Managed Funds Investment form. You can also download this form from our website marginlending.suncorp.com.au

Section 4 Monthly Investment

Specify the managed funds or master trusts in which you would like to make your initial investment.

New/Amend/Cancel	Name of Managed Fund or Master Trust	Your monthly Contribution	Monthly Margin Loan Advance	Total Monthly Investment per Fund
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Total Investment				\$ <input type="text"/>

^If amending, only include details of those investments that need to be amended.

Section 5 Cash Management Trust Account

By applying for a Savings Gearing Loan, you authorise us to open a Cash Management Trust Account (CMA) on your behalf. The CMA will be opened in the name of our Nominees Pty Ltd ABN 90 001 827 998.

This CMA is set up to collect part of the payment for your investments from your variable loan and the other part from your external bank account as you instruct under the Direct Debit Request section below. In addition, your fund manager will be provided authority to draw on this CMA for your total monthly investment.

NOTE: This CMA cannot be used for any other purposes, e.g. interest or dividend payments. If you wish to do so, you may set up another CMA by completing a Cash Management Trust Account form.

**Please send the completed form to:
Suncorp Bank Margin Lending, Reply Paid 1877, Royal Exchange NSW 1225.**

Section 6 Direct Debit Details

Direct Debiting is not available on a full range of accounts. If in doubt please refer to your financial Institution.

This request is to enable Suncorp Bank Margin Lending (USERID 146549) to deduct monthly contributions for savings gearing. By signing this request, I/we, the account holder/s whose account is identified below, authorise you, Suncorp Bank Margin Lending, to use the Direct Debit system to debit my/our account identified below in accordance with the terms of this request. This Direct Debit Request is subject to the terms and conditions of the Direct Debit Service Request Agreement as set out in the Suncorp Bank Margin Lending Terms and Conditions.

Name of Applicant/s – Individual/Joint/Company/Trust

Name of Financial Institution

Branch Name

BSB Number

Account Number

Account Name

I/We request that you debit my/our account for payments to my Loan Account being the monthly contributions for my/our savings gearing loan.

Sign in accordance with authority on the bank account.

Signatory 1

Signatory 2

Signature

Signature

Full Name

Full Name

Date

Date

NOTE: Should your direct debit contribution fail, and we have not heard from you to cancel this loan, we will continue to deduct the monthly Savings Gearing contribution amount from your margin loan each month and will charge you interest on this amount at the standard variable interest rate.

Section 7 Declaration

I/We confirm that the details provided are true and correct.
 I/We have read and understood the terms and conditions of the Savings Gearing Loan.

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

Signature

Full Name

Full Name

Date

Date

IMPORTANT: For a new Savings Gearing Loan, a completed Managed Fund Application and Managed fund investment form must also be include with this form.

Office Use Only

CMA Account no. to Debit

Direct Debit Start Date

Loan Number

Loan Name