

# Instalment Plus / WealthBuilder Maintenance



Your own personal bank

Please use black ink and BLOCK letters.

**Facility Name**

**Facility Number**

**I request a change to my Instalment Plus / WealthBuilder in accordance with the following instructions (please tick one box from the following options):**

Cancel **ALL** my Instalment Plus/WealthBuilder contributions (both my contribution and loan drawdown)

Change my Instalment Plus/WealthBuilder monthly contributions as per my instructions below:

Managed Funds	APIR code	Investor name	Monthly client contribution	Loan Drawdown	Monthly Investment amount	Type: Add/Modify/Cancel

**Total New Monthly Investment**

= Total New Monthly Client Contribution + Total New Loan Drawdown) \$

**Important:** Please ensure that your loan and contribution amounts meet the managed fund/s minimum investment requirements. **Minimum amounts vary depending on individual Fund Manager requirements.**

If you wish to nominate a different bank account for your regular Monthly Contribution, please complete the Nominate/Remove Bank Account - Direct Debit form.

**Acknowledgements**

To authorise this request, the borrowers and all security owners (if different) of the above managed funds are required to sign below.

**Borrower/s**

**Borrower 1/Director 1/Sole Director**

Print full name

  


Signature

Date  /  /

**Borrower 2/Director 2/Secretary**

Print full name

  


Signature

Date  /  /

**Guarantor/s**

**Guarantor 1/Director 1/Sole Director**

Print full name

Signature

Date  /  /

**Guarantor 2/Director 2/Secretary**

Print full name

Signature

Date  /  /

If your Monthly Client Contribution changes, the bank account holder/s (other than the borrower) to the nominated direct debit bank account must sign below:

**Bank Account Holder's Signature**

**Bank Account Holder 1**

Print full name

Signature

Date  /  /

**Bank Account Holder 2**

Print full name

Signature

Date  /  /

**Please complete and return to:**

BOQ Margin Lending  
GPO Box 5388, SYDNEY NSW 2001

Fax: 1300 783 716

(08/10) (S30459-BOQ)

**If you require any assistance, please contact our Client Service Team on 1300 783 709 or email [boq@marginlending.com](mailto:boq@marginlending.com)**