



Application Instalment Plus

Please use black ink, BLOCK letters and mark [x] in the appropriate boxes.

Facility Name

Facility Number

Start Date

Monthly contribution start date:

 / /

Amounts

Initial Investment

(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)

(a) Initial Contribution \$ (minimum \$1,000)

(b) Initial Loan \$

(c) Initial investment = (a+b) \$ (minimum \$3,000)

Payment option for the Initial Contribution (please mark [x] in one (1) box)

- Direct debit from Nominated Account
- Cheque made payable to Leveraged Equities
- Loan drawdown against the Secured Portfolio

Regular Monthly Investment

Your regular Monthly Contribution will be debited from your Nominated Account.

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

(a) Monthly Contribution \$ (minimum \$250)

(b) Monthly Loan \$ (minimum \$250)

(c) Monthly Investment = (a+b) \$ (minimum \$500)

Investment Selection

How the investment is to be allocated between each of your chosen managed funds.

Managed Fund	APIR Code*	Investor Name	Initial Investment	Monthly Contribution (D)	Monthly Loan (E)	Total Monthly Investment (D+E)
			\$	\$	\$	\$
			\$	\$	\$	\$
			\$	\$	\$	\$
			\$	\$	\$	\$
TOTAL						\$

*Please refer to the Acceptable Investments List for the correct fund names and APIR codes.

Acknowledgements

By signing this Instalment Plus Application Form, each Borrower and Guarantor acknowledges that they have read and understood the Leveraged Equities Margin Loan PDS (including the risks), the Leveraged Equities Margin Loan Product Guide, the Mortgage terms, the Agreement, the Direct Debit Service Agreement and the Privacy Disclosure and Consent.

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 / /

Nominated Account holder(s) (other than the Borrower(s)) 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:

Leveraged Equities
GPO Box 5388, SYDNEY NSW 2001

Fax: 02 8282 8383

If you require any assistance, please contact our Client Service Team on 1300 307 807 or email info@leveraged.com.au