



Instalment Plus / WealthBuilder Maintenance

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:

Leveraged Equities | GPO Box 5388, SYDNEY NSW 2001 | Fax: 02 8282 8383

(08/10) (S30459)

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