

Nominate an Authorised Person

To appoint an Authorised Person to your Margin Loan Facility, please complete this form.

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

Facility Name

Facility Number

Authorised Person Details

Title

First Name

Middle Name

Surname

Other Names Known By

Relationship to Borrower

Driver's Licence or
Passport Number

Occupation

Date of Birth

 / /

Residential Address

Address

Suburb

State

Postcode

Country (if not Australia)

Contact Details

Work Phone ()

Home Phone ()

Mobile

Fax Number ()

Email Address

Existing Facility Access Code (FAC)

Please mark [x] in this box if you want a FAC issued to the Authorised Person.

Verification and Identification

Original certified identification documents as per below:

Primary documents (Note: photograph must be clear)

- Australian Driver's Licence (Foreign acceptable if non-resident)
- Australian Passport (Foreign acceptable if non-resident)
- State or Territory issued Proof of Age card.
- Pension Card issued by Centrelink

If the primary document DOES NOT have both a photo and your current residential address, you must ALSO supply ONE secondary document containing your current residential address.

Secondary identification documents

- A notice which records the provision of benefits to the individual which has been issued by Commonwealth, State or Territory within the preceding 12 months and contains the name and residential address of the individual.
- A notice issued by the Australian Taxation Office within the preceding 12 months.
- A notice which is issued by a local government body or utilities provider within the previous 3 months that records the provision of services to that person at that address.

OR

Photocopy of driver's licence or passport

AND any one of the following:

Completed Bank @ Post™ Identification Check including certified copies of identification documents

Existing verified Facility with the Lender

Facility Name

Facility Number

Acknowledgements

1. I/We hereby give the Lender, the Nominee or the Sponsor of investments held in relation to my/our Margin Loan Facility notice that the person named (the "Authorised Person") is authorised to give instructions, receive Notices (excluding Margin Call notices) and do anything else that I/we am/are entitled to do in relation under the Agreement.
2. All instructions from an Authorised Person must be in writing (including by facsimile transmission), bearing the signature of the Authorised Person, unless the Lender, Custodian or Nominee determines in its absolute discretion that any other method is acceptable to it. All parties to my/our Margin Loan Facility are bound by anything the Lender, a Custodian or Nominee does relying on instructions received from an Authorised Person or which appear to have been received from an Authorised Person.
3. The Lender, Custodian and Nominee may refuse to accept instructions from an Authorised Person where in its absolute discretion it determines that it wishes to receive instructions from me/us or another party to my/our Margin Loan Facility.
4. If Lender, Custodian or Nominee gives any notice (excluding Margin Call notices) to an Authorised Person, then I/we or other parties to the Margin Loan Facility as appropriate will be deemed to receive such notice notwithstanding that I/we or other parties may not actually receive, read or listen to such notice.
5. The Lender, Custodian and Nominee may accept instructions from an Authorised Person until such time as the Lender receives written notice from me/us that this is no longer the case. If you nominate a person in their professional capacity, they will remain as an Authorised person, even if they leave or change firms until you provide written notice to cancel their appointment.

Authorised Person

Print full name

Signature

Date / /

Borrower(s)

Borrower 1/Director 1/Sole Director

Print full name

Signature

Date / /

Borrower 2/Director 2/Secretary

Print full name

Signature

Date / /

Please complete and return to:

Ord Minnett Margin Lending
GPO Box 5388, SYDNEY NSW 2001

Page 3 of 3 Nominate an Authorised Person
S32396-ORD (12/22)

If you require any assistance, please contact the Client Service Team on 02 8282 8251 or email customerservice@leveraged.com.au