

Managed Fund (Redemption & Switch Instructions)

Complete this form using **black ink**, CAPITAL LETTERS and mark [x] in the appropriate boxes.

1 Facility Details

Borrower name

Loan account number

2 Managed Fund Instructions

- Redeem managed funds (complete sections 3 and 5)
- Switch between managed funds (complete sections 4 and 5)

3 Managed Fund Redemption

Fund Name	APIR Code	Investor Number	Redemption Amount	
			Dollar	Units
			\$	
			\$	
			\$	
			\$	

Note: Instalment Plus will cease if all units held with in that fund are being redeemed.

Receipt of Proceeds

Please select one of the following options:

- Invest into a new managed fund (please attach a completed application form from the Fund Manager)
- Credit the Margin Loan
- Credit nominated bank account on the Margin Loan (If there is more than one nominated account on the Margin Loan, specify details below)
- Other (please specify the bank account details below)

Name of Bank or Financial Institution

Account Name

BSB Account Number

4 Managed Fund Switch

- A switch is only possible within funds managed by the same Fund Manager or platform.
- To switch into another Fund within the same prospectus, please provide the managed fund details.
- The time taken to switch between funds is dependent upon Fund Manager processing time frames.
- Any regular monthly investments through Instalment Plus into the fund being switched from will be cancelled.
- To apply for regular monthly investment in the new fund, please complete the Instalment Plus application form.

Investor Name

Investor Number

From (Fund Name)	APIR Code	Amount	Or %
		\$	
		\$	
		\$	
		\$	

To (Fund Name)	APIR Code	Amount	Or %
		\$	
		\$	
		\$	
		\$	

5 Acknowledgement and Execution

By signing this form each Borrower:

- Release, discharge and agree to indemnify the Lender, Sponsor and Nominee for all losses, liabilities, actions, proceedings, claims, costs, expenses and demands which may be or brought against or suffered or incurred in respect of any liabilities arising out of a request for a redemption or switch on your investment.
- Acknowledge that by signing this form, each borrower makes an irrevocable instruction to the Lender, Sponsor and Nominee to act upon the choices made in this form.

Signature of Borrower

Print full name

Company/Trust: indicate capacity

Director
 Sole Director and Secretary
 Trustee

Date

 / /

Signature of Additional Borrower

Print full name

Company/Trust: indicate capacity

Second Director
 Company Secretary
 Second Trustee

Date

 / /

Submit this form by:

Mail: Leveraged, GPO BOX 5388, Sydney NSW 2001

Email: info@leveraged.com.au

Fax: 02 8282 8383

For any enquiries please contact your Relationship Manager on 1300 307 807

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