

# Nominate or Maintain a Platform

Complete this form to link your existing Loan Account to a Platform, Master Trust, IDPS, Investment Administration Service, Separately Managed Account or other similar service. You should check the Acceptable Investment List to ensure the Lender will accept these as a Nominated Platform.

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

## 1 Facility Details

Loan Account Name	<input type="text"/>
Loan Account Number	<input type="text"/>

## 2 Nominate a Platform

The Lender is authorised to register its Security Interest over the Nominated Platform identified below or to transfer the investments to the Nominee if the provider can't register the Lender's Security Interest.

A fee may be payable to register the Lender's Security Interest on the Personal Property Security Register (PPSR). Refer to the Fee Schedule for the amount payable.

Platform Provider	<input type="text"/>
Investor Number	<input type="text"/>
Security Owner Name	<input type="text"/>

## 3 Supporting Documentation

Provide a copy of the latest holding statement (less than 3 months old) which lists all investments and the name of all registered owners noted in this form.

## 4 Initial Contribution

Subject to the available funds in your Loan Account, you can arrange an initial contribution to the linked cash account under the Nominated Platform.

You can also elect a client contribution. By requesting this, you are submitting a Direct Debit Request and agreeing to pay in cleared funds, an initial contribution into the Loan Account by direct debit from a Nominated Account. Refer to the Direct Debit Service Agreement available at [www.leveraged.com.au/siteassets/documents/ord-minnett/ord-minnett-terms-and-conditions.pdf](http://www.leveraged.com.au/siteassets/documents/ord-minnett/ord-minnett-terms-and-conditions.pdf), that is Part B of the Leveraged Equities Terms and Conditions for further details.

Initial Contribution Start Date:

<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
----------------------	---	----------------------	---	----------------------

Client Contribution (Optional)	Loan Contribution	Total Initial Contribution
<input type="text"/>	<input type="text"/>	<input type="text"/>

## 5 Monthly Contribution

Subject to the available funds in your Loan Account, you can schedule a monthly contribution to the linked cash account under the Nominated Platform.

You can also elect to schedule a client contribution. By requesting this, you are submitting a Direct Debit Request and agreeing to pay in cleared funds, a monthly contribution into the Loan Account by direct debit from a Nominated Account. Refer to the Direct Debit Service Arrangement for further information

This instruction is to (select one):

☐ Add ☐ Modify ☐ Cancel

Monthly Contribution Start Date:

<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
----------------------	---	----------------------	---	----------------------

Platform Provider	Client Contribution (Optional)	Loan Contribution	Total Monthly Contribution
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## 6 Execution

Borrower/Security Owner 1/Director 1/Sole Director

Signature

Print full name

Date

 /  / 

Borrower/Security Owner 2/Director 2

Signature

Print full name

Date

 /  / 

### Submit this form by:

Mail: Leveraged, GPO BOX 5388, Sydney NSW 2001

Email: [customerservice@leveraged.com.au](mailto:customerservice@leveraged.com.au)

For any enquiries please contact the Customer Service Team on 02 8282 8251

The Ord Minnett Margin Loan is distributed by Ord Minnett Limited ABN 86 002 733 048 and its subsidiaries (together "Ord Minnett"). Leveraged Equities Limited ABN 26 051 629 282 AFSL 360118 is the Lender (either in its own capacity or as trustee of any trust) for the Ord Minnett Margin Loan, and a subsidiary of Bendigo and Adelaide Bank Limited (ABN 11 068 049 178 AFSL 237879). Ord Minnett does not lend money under the Ord Minnett Margin Loan. The information on this document does not constitute financial, investment, legal, tax or other advice and may not be relevant to all investors. Investors should consider the appropriateness of the information to them and read the Product Disclosure Statement and Product Documentation available online at <https://www.leveraged.com.au/ords/>. Any obligation of the Lender, Sponsor, Nominee or Ord Minnett Limited or money held in a Loan Account are not deposits with or liabilities of Bendigo and Adelaide Bank Limited.

**[leveraged.com.au/ords/](https://www.leveraged.com.au/ords/)**