

Refinance In Request

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

1 Facility Details

Loan Account Name

Loan Account Number

Please Note: If you do not have an existing Margin Loan, please complete the Margin Loan application.

2 Details of the Margin Loan to be Refinanced

Name of Margin Lender

Account Number

Account Name of Existing Margin Loan

Loan Amount (if any) to be Refinanced In

\$

3 Repayment of Loan Balance (select one option only)

☐

Full refinance - please note the entire margin lending portfolio will be transferred to the Lender. The HIN will be transferred to the Lender where applicable

☐

Partial refinance - please indicate the security code, security name and number of units you wish to refinance below

Security Code/Security Name	Number of Shares/Units	Registered Name

4 Guarantor Refinance

Please fill in the details below if the refinance of your Margin Loan includes a guarantor.

Guarantor HIN

Name Held on HIN

Acknowledgement

Each Borrower and Guarantor:

- Request the margin lender identified in section 2, to provide Leveraged Equities with all information regarding the margin loan to be refinanced.
- Instruct Leveraged Equities to refinance the loan amount (if any).
- Authorise the transfer of HIN or any other Security to Leveraged Equities, its Sponsor or Nominee to be held as part of the Secured Portfolio.

6 Execution

Signature of Borrower

Print full name

Company/Trust: indicate capacity

☐ Director ☐ Sole Director and Secretary ☐ Trustee

Date

 / /

Signature of Guarantor

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

 / /

Signature of Additional Guarantor

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: 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.

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ORD019 (08/24)

Refinance In Request dated 30 August 2024