

# Westpac Online Investment Loan Loan Refinance Form

Use this form to transfer your existing margin loan to a westpac online investment loan, for either a full or partial refinance. Note: The Westpac Online Investment Loan Facility and refinance amount is subject to credit approval.

You can complete this form online or you can download this form and complete it using a **black pen** - print in clear **CAPITAL LETTERS**.

## QUESTIONS?

If you need help completing this form, please call us on 1300 551 744.

Phone lines are available Mon – Fri from 8.00am – 6.30pm (Sydney time).

## **1. BORROWER'S DETAILS**

Borrower's name(s)	
Existing Westpac Online Investment Loan client code	
2. DETAILS OF LOAN TO BE REFINANCED	
Name of existing margin lender	Full name of existing loan to be refinanced
Account number of existing margin loan	

# 3. FULL OR PARTIAL REFINANCE

#### **Full refinance**

You wish to transfer your entire margin lending portfolio to my Westpac Online Investment Loan.

- I/We authorise our existing margin lender (named above) to provide BT Securities Limited with any and all information regarding my/our margin lending account.
- I/We authorise our existing margin lender (named above) to transfer my/our CHESS HIN and managed fund holdings to BT Securities Limited.
- I/We authorise BT Securities Limited to pay out any outstanding loan(s) against these securities, if any.

OR

### Partial refinance

You wish to transfer a portion of your margin lending portfolio to your Westpac Online Investment Loan.

#### Indicate loan value

\$

- I/We authorise our existing margin lender (named above) to transfer the stocks and holdings listed below to BT Securities Limited.
- I/We authorise BT Securities Limited to pay out any outstanding loan against these securities, if any.

3. FULL OR PARTIAL REFINANCE (continued)	
1 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in
2 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in
	Name security is registered in
3 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in
4 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in
5 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in
6 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in
7 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in
8 PARTIAL REFINANCE	
Name of security	
Quantity (Number of shares or units)	Name security is registered in

# 4. DECLARATION AND SIGNATURES

Where any of the securities to be refinanced are owned by a third party (i.e. not the borrower), the third party security provider is also to sign this section.

Signature o	of <b>Borrov</b>	ver	Signatory's full name (please print)
Signature o	of <b>Additi</b>	onal Borrower	Signatory's full name (please print)
Signature o	of <b>Third F</b>	Party Security Provider	Signatory's full name (please print)
Signature of Additional Third Party Security Provider		arty Security Provider	Signatory's full name (please print)
Date (dd/n	nm/yy) /		
You can s	ubmit tl	his form by:	
Email	>	WOILtransact@westpac.com.au	
Mail	>	Westpac Online Investment Loan GPO Box 3917 Sydney NSW 2001	