



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 are subject to credit approval.

Questions?

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

Phone lines are available Mon – Fri from 8.30am – 5.30pm (Sydney time).

Do you have an existing Westpac Online Investment Loan?

- ☐ Yes  Complete section 1
- ☐ No  Complete section 2. You will also need to complete the Westpac Online Investment Loan Application Form.

1. Borrower's details

Borrower's name(s)

Borrower's 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

Name of third party security provider(s) (if applicable) **Note:** Third party security provider(s) must be registered on your Westpac Online Investment Loan

Is your loan with your current provider fixed? ☐ Yes ☐ No

If 'Yes':

1. What is the maturity date?

/ /

2. Do you want your refinance to take place on or as near as possible to the above maturity date? (must be maturing within 30 days)

☐ Yes ☐ No

If 'Yes', we will endeavour to refinance closer to the above date.

If 'No', we will endeavour to refinance as soon as possible.

3. Full or partial refinance

☐ **Full refinance**

You wish to transfer your entire margin lending portfolio to your 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.

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

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

3. Full or partial refinance (continued)

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 of **Borrower**

X

Signatory's full name (please print)

Date (dd/mm/yyyy)

/ /

Signature of **Additional Borrower**

X

Signatory's full name (please print)

Date (dd/mm/yyyy)

/ /

Signature of **Third Party Security Provider**

X

Signatory's full name (please print)

Date (dd/mm/yyyy)

/ /

Signature of **Additional Third Party Security Provider**

X

Signatory's full name (please print)

Date (dd/mm/yyyy)

/ /

You can submit this form by:

Email



WOILtransact@westpac.com.au

Mail



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Sydney NSW 2001