



# Westpac Margin Lending – Contact Details Amendments

Use this form to add or amend the contact details for a borrower, third party security provider or authorised representative.

## Questions?

If you have any questions regarding completing this form, please call us on 1800 816 222.  
Phone lines are available Monday to Friday from 8.30am to 5.30pm (AEST).

### 1. Borrower's details

Borrower's client code	Borrower's name
<input type="text"/>	<input type="text"/>

### 2. Amend name of borrower, third party security provider or authorised representative

Current name of: **(Please mark with a tick ✓)**

- ☐ Individual borrower
- ☐ Individual third party security provider
- ☐ Authorised representative

Title	Given name(s)	
<input type="text"/>	<input type="text"/>	<input type="text"/>

Current name of: **(Please mark with a tick ✓)**

- ☐ Company or corporate trustee borrower
- ☐ Company or corporate trustee third party

### Individual change of name

Please attach an original certified copy of marriage certificate or appropriate documentation indicating change of name by deed poll.

Title	New given name(s)	New surname
<input type="text"/>	<input type="text"/>	<input type="text"/>

Old signature	New signature
<input type="text"/>	<input type="text"/>

### Company change of name

Please provide your new company name and attach an original certified copy of Certificate of Change of Name (issued by ASIC).



### 3. Change of address and contact details

The address and/or contact details being updated relate to: **(Please mark with a tick ✓ and complete name of party selected)**

- ☐ Individual borrower or individual trustee borrower
- ☐ Individual third party security provider
- ☐ Authorised representative
- ☐ Company borrower or Corporate trustee borrower
- ☐ Company third party or Company third party trust security provider

Name

**New residential address – a PO Box is not acceptable**

**New Mailing address – write “as above” if the same as your new residential address** (By instructing us to change your mailing address, you authorise us to change your mailing address for your Margin Loan, Holder Identification Number (HIN), CHESS, Cash Management Trust Account (CMA) and Managed Fund holdings, where applicable)

New home phone number

Please ensure you include the area code

New work phone number

Please ensure you include the area code

New email address

New mobile number (this mobile number will also receive one-time passwords)

### 4. Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at [westpac.com.au/privacy/privacy-statement](https://westpac.com.au/privacy/privacy-statement) or by calling us on 132 032.

Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your application or request.



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## 5. Signing section

Borrower(s) is/are required to sign when any of the contact details changed relate to the borrower(s).

Third party security provider(s) is/are required to sign when the contact details changed relate to the third party. The borrower(s) is/are not required to sign in this instance.

Authorised representatives are required to sign when the contact details changed relate to the authorised representative. The borrower(s) is/are not required to sign in this instance.

**For Company/Company Trustee Borrowers and/or Third Party Security Providers, either two Directors, or one Director and the Secretary or the Sole Director and Secretary must sign. Please indicate your company capacity by marking the appropriate box below your signature.**

Signature of Borrower

X

Date

/ /

Please print full name

Company Officer: Please indicate company capacity ☐ Sole Director/Secretary OR ☐ Company Director

Signature of Additional Borrower

X

Date

/ /

Please print full name

Company Officer: Please indicate company capacity ☐ Company Director OR ☐ Company Secretary

Signature of Third Party Security Provider

X

Date

/ /

Please print full name

Company Officer: Please indicate company capacity ☐ Sole Director/Secretary OR ☐ Company Director

Signature of Additional Third Party Security Provider

X

Date

/ /

Please print full name

Company Officer: Please indicate company capacity ☐ Company Director OR ☐ Company Secretary



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## 5. Signing section (continued)

Signature of Authorised Representative

X

Date

/ /

Please print full name

You can submit this form by:

🏠 Westpac Margin Lending  
GPO Box 3917, Sydney NSW 2001

✉ [mltransact@westpac.com.au](mailto:mltransact@westpac.com.au)

The original Contact details amendments form must be sent to Westpac Margin Lending if changing an individual or company name.



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