

11. Linking an account

Complete the details below to link your account to either your Cash Management Account or you Asgard Share Portfolio Account, providing they are held in **exactly the same name**, to provide consolidated statement reporting.

I/We hereby authorise St.George Bank Limited to link my/our St.George Bank/Bank of South Australia Account to my/our account.

Account name

BSB number

 -

Account number

I/We hereby wish to have my/our account linked to my/our Asgard Share Portfolio Account.

Account number

 - D5 -

Account name

The name, contact and postal address details for your account will be exactly the same as recorded in our systems for your existing account.

12. Gearing

Change my gearing as follows:

Establish gearing of \$

i If you are setting up gearing, please refer to the 'How to proceed' section of the gearing booklet.

OR

Change my gearing ratio

To choose the default tick the box below.

Default (65%)

OR

Enter the percentage amount of your gearing ratio.

% (1% - 65%)

Note: The maximum gearing ratio is 65%.

AND/OR

Change my automatic selldown ratio

To choose the default tick the box below.

Default (70%)

OR

Enter the percentage amount of your automatic selldown ratio.

% (6% - 70%) **There must be a minimum 5% buffer between your gearing ratio and the automatic selldown ratio**

Note: The automatic selldown ratio is the point where your managed investments will be automatically sold to fund a margin call. For example if your nominated gearing ratio is 50%, and your nominated automatic selldown ratio is 60% the automatic sale of managed investments will occur when your actual gearing ratio reaches 60%. The maximum automatic selldown ratio is 70%.

OR

Increase gearing by \$

This will increase gearing to \$

OR

Decrease gearing by \$

This will reduce gearing to \$

12. Gearing (continued)

OR

- Cancel borrowing arrangements and:
 - commence selling managed investments to repay my gearing
 - a personal cheque is being forwarded to repay my gearing
 - a cheque from an external lender is being forwarded to repay my gearing.

Note: We will commence selling managed investments immediately unless a personal cheque or a cheque from an external lender is being forwarded to us.

AND/OR

- Gearing deposit fee (max 5.0%)

13. Change of financial adviser

I/We have changed my/our financial adviser. My/Our new financial adviser is:

Adviser's company

Adviser's name

Adviser's phone

Adviser's code

 BA

Asgard client relationship centre

I/We authorise Asgard to change my/our financial adviser on my/our account.
This authorisation revokes my/our previous financial adviser's right to information relating to my/our account and now authorises Asgard to provide information relating to my/our account, and pay adviser remuneration to my/our new financial adviser.

Dealer stamp

14. Signatures

Please make the changes as marked in sections 1 to 13 to my/our account.

If section 12 has been completed, I/we understand that the current maximums for the gearing ratio and automatic sell-down ratio, both default and investor selected, may be changed by St.George without notice.

Individual or joint applicants sign here

If the account is in joint names, both applicants must sign.

Signature

Date

Signature

Date

Companies or trustee companies sign here

If signing under common seal, we confirm it was affixed in our presence.

Signature – Director/Sole Director and Sole Secretary (delete as applicable)

Signature – Secretary/Director (delete as applicable)

Date

Common seal