

INVESTMENT LOAN CLOSURE OR REPAYMENT FORM

CommSec Adviser Services
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Form ID: 2022

Where to send this form?

Please provide your completed and signed form with any relevant supporting documents to your adviser.
Adviser use only: Use this Form ID to securely submit the documents via eSubmit. To use eSubmit, log into the CommSec Adviser Services website and go to: **Administration > eSubmit**

1 INVESTMENT LOAN DETAILS

COMPULSORY

INVESTMENT LOAN NUMBER

BORROWER NAME(S)

2 TRANSACTION REQUEST

COMPULSORY

Close my investment loan. This will occur when the Loan balance has been paid out in full and all security has been transferred.

Repay my investment loan in full. This will leave your investment loan open.

Partially repay my Investment Loan. Please specify amount you wish to repay.

\$

3 PAYMENT OF LOAN BALANCE

COMPULSORY

All closure requests will include interest costs (if not already direct debited), stamp duty and ASIC fees within repayment amount.

Please indicate how you would like the loan to be repaid.

Debit my linked bank account below.

ACCOUNT NAME

NAME OF FINANCIAL INSTITUTION OR BANK AT WHICH YOUR ACCOUNT IS HELD

BANK STATE BRANCH (BSB)

ACCOUNT NUMBER

Debit a new bank a/c – I have attached a Direct Debit Authority form with this request.

Proceeds from Redemption of Managed Funds – please indicate full details of redemption in Section 4 below.

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7 WE VALUE YOUR FEEDBACK

IF APPLICABLE

We would appreciate your feedback to help us continually improve our products and services.

What are the reasons for closing and/or repaying your investment loan? (You may select more than one response)

<input type="checkbox"/> Product features	<input type="checkbox"/> No longer part of investment strategy
<input type="checkbox"/> Interest rate	<input type="checkbox"/> Poor customer service
<input type="checkbox"/> Financial adviser recommendation	<input type="checkbox"/> Market expectations
<input type="checkbox"/> Refinancing loan to <input type="text"/>	
<input type="checkbox"/> Other <input type="text"/>	

Please provide feedback on your response/s above or any suggestions on how we can improve our products and services?

8 SIGNED AUTHORITIES

COMPULSORY

We authorise CommSec Adviser Services Investment Lending to affect all instructions indicated on this request form.

If this is a joint/Third Party/Company/Trustee account – please ensure all parties have signed the request.

BORROWER NAME 1 / DIRECTOR 1 / ADVISOR

PRINT FULL NAME

SIGNATURE

DATE

BORROWER NAME 2 / DIRECTOR 2

PRINT FULL NAME

SIGNATURE

DATE



Where to send the completed form?

Once completed and signed, please return the form by the eSubmit instructions provided on page 1.