

CALIA+ FIXED SUBACCOUNT FORM

Form ID: 5006

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**

Use this form to add a Fixed LOC to an existing CALIA+ Facility.

CLIENT NAME/S

FACILITY NUMBER

ADVISER NAME

NECESSARY INFORMATION FOR ALL FIXED LOANS:

PURPOSE:

PERSONAL INVESTMENT

LOAN TO BE FIXED IN:

ARREARS ADVANCE (INVESTMENT LOC ONLY)

TRAIL COMMISSION NOMINATION:

If your CALIA+ Facility was established before 1 July 2014 (tick one box)

TRAIL COMMISSION NO TRAIL COMMISSION

If your CALIA+ Facility was established after 1 July 2014 and you are a wholesale client please tick the box below to indicate if Trail Commission will be payable*

TRAIL COMMISSION - Wholesale Client Form has been submitted

TERM YEARS (MUST BE 1-5 YEARS)

BANK STATE BRANCH (BSB)	ACCOUNT NUMBER	CURRENT NOMINAL LIMIT	REQUESTED NOMINAL LIMIT
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
		BUNDLE LIMIT	
		CURRENT NOMINAL LIMIT	REQUESTED NOMINAL LIMIT
		\$ <input type="text"/>	\$ <input type="text"/>

FIXED INTEREST AMOUNT DEBITED FROM SUB-ACCOUNT

BANK STATE BRANCH (BSB) ACCOUNT NUMBER

1. PLEASE ENTER YOUR APPROXIMATE ANNUAL GROSS INCOME (PRE-TAX)

BORROWER NAME/S

BORROWER 1

BORROWER 2

REQUESTED LIMIT

\$

2. CONVERT CURRENT CALIA+ VARIABLE LOC TO A FIXED LOC

BANK STATE BRANCH (BSB) ACCOUNT NUMBER

- All fixed accounts must be fully drawn for the term of the loan, with no transactions.
- If converting an existing Variable LOC to a Fixed LOC purpose (Investment/Personal) cannot be changed.
- If you would like to increase the Bundle Limit, please complete the Bundle Limit Increase Form.