

# Change of Account Details Form

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237492 RSEL L0001281. Macquarie Superannuation Plan ABN 65 508 799 106 RSE R1004496. Macquarie Bank Limited ABN 46 008 583 542 AFSL 237502 is the issuer of the Macquarie Cash Management Account (CMA), Macquarie Consolidator Cash Account (Cash Account), Macquarie Wrap Cash Account (Wrap Cash Account) and Macquarie Vision Cash Account (Cash Account). Macquarie Equities Limited ABN 41 002 574 923 AFSL 237504.

**Use this form to:**

- update your contact details - **complete sections 1, 2 and 7**
- update your tax residency information - **complete sections 1, 3 and 7**
- update your name - **complete sections 1, 4 and 7**
- update your nominated account to receive pension payments - **complete sections 1, 5 and 7**
- appoint a new adviser on your Wrap account - **complete sections 1, 6 and 7**

## 1. Account details

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Account number

Account name

## 2. Update contact details

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Client name

Mobile number



**Please contact us via live chat to update your mobile number**

Email<sup>1</sup>

Cannot belong to your adviser

**Residential address:**

Cannot be a PO box

Street number and name:

Suburb:

State/Territory:

Postcode:

Country:

**Mailing address:**

Same as Residential address

Street number and name:

Suburb:

State/Territory:

Postcode:

Country:

This mailing address update will automatically apply to any individual accounts in your name. It will not apply to joint, company or trust accounts unless specified below or in section one of this form.

Account numbers:

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1. If applicable, this is where we will send contract notes.

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### 3. Tax information

Tax Residency rules differ by country. Whether an individual is tax resident of a particular country is often (but not always) based on the amount of time a person spends in a country, the location of a person's residence or place of work. For the US, tax residency can be as a result of citizenship or residency.

#### Client name

#### Residency status

Are you a tax resident of Australia?      Yes      No

Are you a tax resident of another country?      No      Yes, please specify below

Country:      TIN:      If no TIN, reason A, B or C:

Reason A: The country of tax residency does not issue TINs to tax residents

Reason B: The individual has not been issued with a TIN

Reason C: The country of tax residency does not require the TIN to be disclosed

If there are more countries, provide details on a separate sheet and tick this box

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### 4. Change of name

#### Full name

Your new name

Title:

First name:

Middle name(s):

Surname:

#### Signature

Wet signatures required.  
Please provide a certified copy  
of any supporting documents  
(i.e. marriage certificate, deed  
poll etc).

#### Old signature:

#### New signature:

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### 5. Update your nominated account to receive pension payments

#### Nominated account details

This bank account will replace/  
update the bank account  
nominated to receive pension  
payments from your account.  
The account must be in your  
name.

BSB:

Account number:

Account name:



**This form cannot be used to nominate accounts for Investment and Cash Management Accounts**

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## 6. Appoint a new adviser

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### New adviser details

Please note only advisers who are registered with us can be appointed.

Adviser name:

Adviser code (if known):

Licensee name:

### Adviser fees

Please retain the existing advice fees loaded on my account and pay these to my new adviser. If you do not check this box your existing advice fees will cease to be paid.

## 7. Signature

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By signing this form, I represent to Macquarie that all information provided is true and correct.

Signature 1:

Signature 2:

Name:

Name:

Date:

Date:



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### Sign

- ☒ Wet signature
- ☒ Electronic signature from an approved provider.  
Visit Help Centre to view our requirements.

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### Submit

-  Upload to **Request Centre** (advisers only)
-  Email to **wrapsolutions@macquarie.com**

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### Need Help?

If you're an adviser, you can visit **Adviser Help Centre** or chat to us through Adviser Online

If you're a client, you can visit our **Personal Help Centre**, speak to your adviser, or call us on 1800 025 063