MACQUARIE

Macquarie Wrap Investment Accumulator Withdrawal request

Use this form to make a withdrawal from your Investment Accumulator account.

If your account is attached to a Margin Loan, please forward this completed form to the Margin Lender to authorise the withdrawal from your account.

⚠ **Any amendments to this form must be signed in full by the applicant(s).**

1. Account details

Account number:

Account name:

2. Withdrawal details

Is this a full withdrawal? (select one only)

☐ Yes. **This request will constitute a request to close your account.**

Please ensure all holdings have been sold down to cash by your adviser and any automated plans are turned-off.
If your holdings have not yet been sold down, we can draw down the account to the minimum balance of $250 now, and withdraw the remainder when all holdings are sold down and proceeds are received.

☐ If you require this, please cross here.

☐ No, please state the amount(s)

All withdrawals will be debited from the Cash Account. Please ensure the minimum cash requirement of $250 remains.

How would you like the withdrawal paid? (select one only)

☐ Deposit into my primary nominated bank, building society or credit union account on your records.

☐ Deposited into my bank, building society or credit union account nominated below.

⚠ **Please check your account details carefully. It's your responsibility to ensure all payee details are correct. We do not match the account name against the account number you provide. We do not accept liability for funds unable to be recovered. Please confirm the correct account details with the payee.**

Please note: Macquarie's Cash Electronic Message Service does not provide rollover SuperStream Services. If you are withdrawing funds as part of a rollover of your SMSF to another superannuation fund (including a Macquarie superannuation fund), you should also make SuperStream arrangements to ensure the receiving superannuation fund can receive your funds and process your rollover.

Macquarie Investment Management Limited ABN 66 002 867 003 AFSL 237 492 RSEL L0001281

2. Withdrawal details (continued)

☐ Cross here to add the account specified below as a nominated account.

Bank, building society or credit union:

Account name:

BSB number:

Account number:

Optional reference OR Tax Office Reference (ETF Code) to appear on destination account (max 18 characters)

Optional narrative to appear on your statement (max 40 characters)

SuperStream Payment Reference Number (PRN) (You should contact your Electronic Service Address to provide a payment reference number)

3. Special instructions (optional)

4. Signature of account holders

Account holder 1

Signature

Name

Date

Corporate title if company office

Account holder 2

Signature

Name

Date

Corporate title if company office

Sign

✓ Wet signature, or

✓ Electronic signature from an approved provider.

Visit Adviser Help Centre to view our requirements.

Submit

Advisers only upload via Request Centre

Clients only email to wrapsolutions@macquarie.com

Mail to **Macquarie, GPO Box 4045, Sydney NSW 2001**

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

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