

The ASX Clearing, Trading & Settlement Participant for this account is OpenMarkets. OpenMarkets Australia Ltd, Level 5/500 Collins Street, Melbourne VIC 3000 ABN: 38 090 472 012 AFSL: 246705. Market participant of ASX, Chi-X, NSX.

**Digital/electronic signatures are not accepted. Sign with a pen. Attach a copy of all account holders' photo ID (certified for CommSec).**

Please return the completed, signed form along with ID of all account holders (certified if transferring from CommSec) to support@selfwealth.com.au.

### 1. Your SelfWealth Account Details

To find this information, ensure you are logged in and have the correct portfolio selected, then click 'Trading Account' in the left-hand-side menu. Your **OpenMarkets ID** will be displayed under 'Account Details'.

Your OpenMarkets ID (not your HIN)	
SelfWealth Trading Account Name	

### 2. Your Other Broker Details

For your transfer to be successful, your registration details on this form must be an EXACT match with the registration details on your SelfWealth trading account. If not, you will need to contact your other broker to change your registration details.

Ask your other broker for their PID, a four digit number that represents that broker. You can also check your CHESS statement (see page 3).

Sponsoring Broker		Broker PID	
Your Account Name (at other broker)			
Account Designation (if applicable)	<		A/C >
Registration Address			
	State	Postcode	
HIN (at other broker)	Max. 11 Digits		

### 3. Checklist Before Signing

**FOR YOUR TRANSFER TO BE PROCESSED WITHOUT DELAY PLEASE ENSURE:**

- |  |   |
|--|---|
| <input type="checkbox"/> Name and address details listed on your current SelfWealth trading account are the same as the details held with your other broker. | <input type="checkbox"/> You have no outstanding orders or pending trade settlements for the shares you wish to transfer. |
| <input type="checkbox"/> All security holders requesting the share transfers sign this document WITH AN INK PEN.   | <input type="checkbox"/> For joint or trust accounts, all holders of the account sign.                                    |
| <input type="checkbox"/> Photo ID of all account holders is attached. They must be certified if transferring from CommSec.                                   | <input type="checkbox"/> You reference the correct HIN and PID of the other broker. (See page 3 for an example)           |

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### 4. Choose a Transfer Type

ALL of your holdings including your HIN   OR    ONLY the holdings listed below

We only currently accept ASX-listed securities. If you do not choose the correct transfer type your transfer may be rejected.

Ticker Code (E.g. BHP)	Full Company or Fund Name	Quantity of Shares / Units

**Your name and address in your SelfWealth account and the other broker must match EXACTLY otherwise the transfer will fail.**

Authorisation. Digital signatures are not accepted. Please ensure you sign the form with a pen.

Account Holder 1 Name (Full Name)	Date
	Signature
Account Holder 2 Name (Full Name)	Date
	Signature
Account Holder 3 Name (Full Name)	Date
	Signature

All account holders must sign. For company accounts, sign in accordance with the company's constitution.

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### Example of a CHESSE Statement



**QZJV Enterprises Pty Ltd**  
ABN 00 012 345 678  
State of Incorporation/Registration: NSW


**CHESSE HOLDING STATEMENT**

For statement enquiries contact your CHESSE sponsor:  
**FIRST INTERNATIONAL N.Y. AUSTRALIA EQUITIES LTD**  
LEVEL 10, GRAND PLACE  
15 GRACE STREET  
BRISBANE, QLD 4000  
☎ (07) 3123 4567

<b>Holder ID Number (HIN):</b>	<b>1234567890</b>
<b>CHESSE Sponsor's ID (PID):</b>	00000

Statement Period: January 2001

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SAMPLE CORPORATE SERVICES  
C/- MRS JOAN ANN JONES  
LVL 12  
123 BOUNDARY ST  
SAMPLESVILLE QLD 1234

**QZJ - ORDINARY FULLY PAID**

Date	Transaction Type	Transaction ID	Ex/Cum Status	Quantity On	Quantity Off	Holding Balance
	<b>Balance Brought Forward from 11 Dec 00</b>					<b>200</b>
08 Jan 01	Bonus Issue Allotment	1234567890123456		100		300

**HIN** - This is your unique holder number attached to these securities.

**PID** - This is your other broker's unique identifier.

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### Use this page if you need to add additional securities to Step 4.

Ticker Code (E.g. BHP)	Full Company or Fund Name	Quantity of Shares / Units

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Account Holder 1 Name (Full Name)	Date
	Signature
Account Holder 2 Name (Full Name)	Date
	Signature
Account Holder 3 Name (Full Name)	Date
	Signature

All account holders must sign. For company accounts, sign in accordance with the company's constitution.