

Bulk off-market transfer between Selfwealth accounts

Complete this form to transfer off-market a list of securities between Selfwealth portfolios that involve a **CHANGE IN BENEFICIAL OWNERSHIP**.

Once completed and signed (by all authorized signatories), please return the form along with a copy of the Seller(s) and Buyer(s)' ID to **support@selfwealth.com.au**.

If you need any help along the way, you can also send questions to the email address above or via Live Chat.

- To locate your account information, login to your Selfwealth account. Select the correct portfolio in the left column, scroll down to **TRADE**, and select **Trading Account** then **Account Details**.
- Any alterations must be initialed by the Seller(s) and the Buyer(s). Any increase to the quantity of securities will require a new transfer form.
- Please note, this transaction may incur a standard fee of \$27.50 (incl. GST) per security.

We consent for Selfwealth to debit the fee of \$27.50 per security associated with this Off-Market Transaction from the:

☐

Buyer(s)

☐

Seller(s)

Selfwealth ANZ Cashactive Account

1. Seller(s)/Transferor(s) details

Selfwealth ID

Selfwealth trading account name

Account designation if applicable

Your registered address

State

Postcode

HIN

2. Buyer(s)/Transferee(s) details

Selfwealth ID

Selfwealth trading account name

Account designation if applicable

Your registered address

State

Postcode

HIN

3. Details of Security

Date of transfer

Ticker code ASX only	Security name	Units	Consideration (AUD\$)
EG. SWF	Selfwealth Ltd	30	\$950

I/We the registered holder(s) and undersigned Seller(s) for the above consideration do hereby transfer to the above name(s) hereinafter called the Buyer(s) the securities as specified above standing in my/our name(s) in the books of the above named Company, subject to the several conditions on which I/We held the same at the time of signing hereof and I/We the Buyer(s) do hereby agree to accept the said securities subject to the same conditions. I/We have not received any notice of revocation of the power of attorney by death of the grantor or otherwise, under which this transfer is signed (if applicable).

4. Seller(s)/Transferor(s) signature(s)

Account holder 1

Signature

Digital signature not accepted

Account holder 2

Signature

Digital signature not accepted

5. Buyer(s)/Transferee(s) signature(s)

Account holder 1

Signature

Digital signature not accepted

Account holder 2

Signature

Digital signature not accepted