

Use this form if you want to update the external bank account you can withdraw from your Selfwealth trading cash account to.

Once completed and signed by all authorised signatories, submit your form to **support@selfwealth.com.au** using your registered email, with the following documents:

<input type="checkbox"/> 1 x copy of ID for all account holders. (This can be a driver's license or passport)	<input type="checkbox"/> 1 x bank statement issued within the last 90 days displaying the Name, BSB and account number for the new nominated bank account.	<input type="checkbox"/> 1 x selfie of each account holder holding their ID with their face visible, including a piece of paper with the current date.
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1. Your trading account details

Your Selfwealth ID can be located by selecting your portfolio > select Trading Account > Account Details.

Your Selfwealth ID

Your trading account name

2. Your new bank account details

The bank account must be in the same name as the Selfwealth trading account. Refer to the next page of this documents for acceptable examples.

I/We authorise for my/our nominated bank account details to be amended to:

Financial institution (e.g. NAB)

Name of bank account (e.g. Jane Smith)

BSB

Account number

3. Signatures

By signing this document, I/we authorise Selfwealth and their service providers to carry out the instruction to change my/our nominated bank account details.

Account holder 1

Signature

Must be signed in 'wet ink'

Account holder 2

Signature

Must be signed in 'wet ink'

Selfwealth Ltd. ACN 154 324 428 AFSL 421789 Level 7, 130 Lonsdale Street, Melbourne, VIC, 3000. The ASX Clearing, Trading & Settlement Participant for Selfwealth is FNZ Custodians (Australia) Pty Ltd. PID 03772 ABN 88 624 689 694 AFSL 507452 Level 1, 99 Elizabeth Street, Sydney, NSW, 2000. The International Trading and Settlement participant for Selfwealth is Phillip Capital Limited ABN 14 002 918 247 AFSL 246827 Level 5, 45 William St, Melbourne VIC 3000



Change of Nominated Bank Account Details

To reduce the risk of unauthorised activity, the nominated bank account must be in the same name as the Selfwealth Trading Account. Below are the acceptable nominated bank accounts names that can be accepted based on account type.

Account type	Name of Selfwealth account	Examples of acceptable bank account names
Individual	Jane Smith	Jane Smith; Jane and John Smith
Joint	Jane Smith and John Smith	Jane Smith; John Smith; Jane and John Smith
Minor Account	Jane Smith <Jessie Smith A/C>	Jane Smith; Jane and John Smith; Jane and Jessie Smith
Company Account	Smith Trading Pty Ltd	Smith Trading Pty Ltd
Trust Account (excluding SMSFs)	Jane and John Smith ATF <Smith Family Trust Account A/C>	Name of the Trust. e.g. Smith Family Trust Account Name of the individual or corporate trustees
Self Managed Super Funds (SMSFs)	Jane and John Smith ATF <Smith Family Super Fund A/C>	Must be in the name of the trustees with the SMSF as designation. E.g. Jane and John Smith <Smith Family Super Fund>
	Smith Trading Pty Ltd <Smith Family Super Fund A/C>	Must be in the name of the trustees with the SMSF as designation. E.g. Smith Trading Pty Ltd <Smith Family Super Fund>