

## Off-Market Transfer Change of Trustee

Complete this form to transfer Off-market a list of securities from an old trustee account/name (Seller) to a new trustee account/name (Buyer).

- You will need to submit a new online application with Selfwealth/FNZ in the name of the new trustee (Buyer).
- A certified copy of the Trust Deed or Deed of Amendment must be provided.
- To locate your Selfwealth trading account details, please login to your Selfwealth account. The information will be visible in the Trading Account section, under Account Details.
- Please note, this transaction may incur a standard fee of \$27.50 per security.

Once completed and signed (by all authorised signatories), return to **support@selfwealth.com.au** along with the relevant documentation.

### Seller(s)/Transferor(s) details

Registration name

***Please use BLOCK letters***

  

Account designation *if applicable*

  

Registered address

  

State

Postcode

Trading account number

HIN

### Buyer(s)/Transferee(s) details

Registration name

***Please use BLOCK letters***

  

Account designation *if applicable*

  

Registered address

  

State

Postcode

Trading account number

HIN

