



i Complete this form if you wish to update/remove the Director/Secretary operating on behalf of the company.
New Director/Secretary must be an existing Westpac customer.

1. Account Details

Share trading account number	Account name	Australian Company Number (ACN)
<input type="text"/>	<input type="text"/>	<input type="text"/>

2. Existing Director/Secretary

Remove the following Director/Secretary from the company account

Full Name/s

3. New Director/Secretary Details

Mr Ms Mrs Miss Dr Other

First name	Middle name/s	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>

Other name/s commonly known by – *If applicable* Date of birth – DD / MM / YYYY Male Female

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Residential Address

Street address – *Cannot be a PO Box*

Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Country

Postal Address

Same as residential address

Street address

Suburb	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Country

Contact Details

Email address – *This email address will be the default email address used for electronic CHESSE statement delivery.*

I do **not** wish to receive electronic CHESSE statements.

Mobile number	Home number	Work number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Is the Director/Secretary a Beneficial Owner of the company? (Own 25% or more of the shares in the Company, either directly or indirectly)

Yes No – *if no, please answer next question*

If **no**, is the Director/Secretary responsible for the strategic or financial decisions of the Company (that is, the individual who exercises primary control over the company because of the position they hold, e.g. the CEO, Managing Director, or equivalent.)

Yes No



Identification

To meet our obligations under the *Anti Money Laundering/Counter-Terrorism Financing Act 2006 (Cth)*, we must identify customers before we provide a service.

Please provide a Westpac bank account **or** Customer ID for Director/Secretary 1.

Westpac BSB and account number

BSB

Account number

Westpac Customer ID

Do you have a Westpac Share Trading account?

<input type="radio"/>	Yes
If Yes , please provide your Westpac Share Trading Username. <i>Providing your Username allows us to link the new trading account to your current Username.</i>	
Username	
<input type="text"/>	
<input type="radio"/>	No
If No , please provide us with a temporary login password. <i>You'll need this the first time you log in. Your Username will be provided in a welcome email when your account has been established.</i>	
Temporary Login Password	
<input type="text"/>	
<i>Your nominated temporary password:</i>	
- Must be between 6 and 16 characters long	- Must not contain spaces
- Is not case sensitive	- Can contain most characters except '<=>^{}'
	- Must not contain your Username or the word 'password'

Promotional Material

From time to time, Westpac Share Trading may provide you with promotional information about products, services and special offers. If you do not wish to receive promotional information (including IPO information) from Westpac Share Trading please indicate your preference by selecting the box below.

Please note: Your preference below will apply to the new or existing Westpac Share Trading Username assigned to access your new trading account. If your contact details are used by other Westpac Share Trading Usernames, you will need to amend how you are sent promotional information for these separately. Regardless of your nomination below, you will continue to receive service communications relating to your account including trade confirmations, order notifications and account statements to your nominated email and/or postal address.

If you also no longer wish to receive promotional information from Westpac Banking Corporation, please login to Westpac Live Online Banking and update your preferences.

I do **not** wish to receive any promotional information (including IPO information) from Westpac Share Trading.



4. New Company Director/Secretary to be added

I the undersigned:

1. Declare that the information I provided to you in this form is complete and correct and acknowledge that it will form part of the contract for this trading account;
2. Consent to the collection, use, disclosure and storage of my personal information in accordance with the Customer Information and Privacy section in the Westpac Share Trading Terms and Conditions and the Westpac Privacy Statement (available at [westpac.com.au/privacy/privacy-statement](https://www.westpac.com.au/privacy/privacy-statement) or by calling 132 032), each as amended from time to time.
3. Declare that I have read and understood Westpac's Data Protection Policy at [https://www.westpac.com.au/privacy/eu-data-protection-policy/Declaration to Terms and Conditions](https://www.westpac.com.au/privacy/eu-data-protection-policy/Declaration%20to%20Terms%20and%20Conditions).

Declaration to Terms and Conditions

1. I hereby acknowledge that I have read and understood the Financial Services Guides provided to me by Westpac Securities Limited and the Participant.
2. I have read and agree to be bound by the Participant's Terms and Conditions of Share Trading Account.
3. I have read and agree to be bound by the Participant's Terms and Conditions of Online Access.
4. I agree to be sponsored by the Participant under the terms of the Participant Sponsorship Agreement. I have read and agree to be bound by the Participant's Terms and Conditions of Participant Sponsorship Agreement.

New Director/Secretary

Full name

Date signed – DD / MM / YYYY

 / /

Signature – *Must be signed pen to paper*

Existing Director

Full name

Date signed – DD / MM / YYYY

 / /

Signature – *Must be signed pen to paper*

Existing Director/Secretary

Full name

Date signed – DD / MM / YYYY

 / /

Signature – *Must be signed pen to paper*

Westpac Share Trading is a service provided through Westpac Securities Limited, ABN 39 087 924 221, AFSL 233723 ("Westpac Securities") by Australian Investment Exchange Limited ABN 71 076 515 930, AFSL 241400 ("AUSIEX"), a wholly owned subsidiary of Nomura Research Institute, Ltd. ("NRI"). AUSIEX is a Market Participant of the ASX Limited ("ASX Limited") and Cboe Australia Pty Ltd ("Cboe"), a Clearing Participant of ASX Clear Pty Limited and a Settlement Participant of ASX Settlement Pty Limited. AUSIEX is not authorised to carry on business in any jurisdiction other than Australia. Accordingly, the information contained in this document is directed to and available for Australian residents only.

How to submit your documents

Once completed and signed, please scan and email, or post the form to

✉ maintenance@sharetrading.westpac.com.au

📍 **Westpac Share Trading**
Reply Paid 85157
Australia Square NSW 1214

☎ 13 13 31
🌐 sharetrading.westpac.com.au