


# Change of Company/Trust Details

Share Trading is a service provided by Australian Investment Exchange Ltd (the Participant, we, us, our)  
 ABN 71 076 515 930 AFSL 241400, a participant of the ASX Group and Chi-X Australia.

 **Where to send the completed form?**  
 Once completed and signed, please return the form and any supporting identification documents by email (preferred), fax or post to the details listed at the top of this page.

## Section 1 – Existing Company/Trust Details

Trading Account Number

Trading Account Name


Australian Company Number (ACN) (if applicable)

## Section 2 – Type of Change

- Company Name – Go to Section 3
- Address Details – Go to Section 4
- Contact Details – Go to Section 5
- Change of Company Director/Secretary – Go to Section 6
- SMSF/Trust Account Designation – Go to Section 7

## Section 3 – Change of Company Name

Please attach a copy of the 'Certificate of Registration of Change of Name' from ASIC.

New Company Name


## Section 4 – Change of Company/Trust Address Details



Please complete the separate Change of Address/Contact Details form available from the website to change the address of Director/Secretary or trustees operating the account.

New Registered Business/Trust Address (cannot be PO Box)

State	Postcode
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New Postal Address

Same as Registered Business/Trust Address

State	Postcode
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New Principal Place of Business Address (cannot be a PO Box)

Same as Registered Business Address

State	Postcode
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Other CHES Registration Address (if not New Postal Address)

State	Postcode
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## Section 5 – Change of Company/Trust Contact Details

Email Address

Phone

## Section 6 – Change/Add Company Director/Secretary

Complete this section to update the Director/Secretary on the company account.

If there a more than 1 new Director/Secretary to be removed/added please photocopy this section, complete and attach to the form.

### Existing Director/Secretary Details

Please remove the Director/Secretary individual listed below from the company account


### New Director/Secretary Details

In what capacity are you completing this section?

- Director       Secretary
- Mr    Ms    Mrs    Miss    Dr   Other

Given Name/s

Surname

Other name/s commonly known by (if applicable)

**Section 6 – Change/Add Company Director/Secretary (continued)**

Date of Birth  Gender  Male  Female

**Job Category**

(see the Job and Industry Classifications List available from the website for a list of acceptable job categories)

**Job Type**

(see the Job and Industry Classifications List available from the website for a list of acceptable job types)

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

Yes  No (please answer next question)

If not a Beneficial Owner, is the Director 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

**Address Details**

Residential Address (cannot be a PO Box)

<input type="text"/>	
<input type="text"/>	
State	Postcode
Country (if not Australia)	

Postal Address  Same as Residential Address

<input type="text"/>	
<input type="text"/>	
State	Postcode
Country (if not Australia)	

**Contact Details**

Email Address (must be Director/Secretary's email address)

Nominate your preferred contact number

Mobile	<input type="text"/>	<input type="checkbox"/>
Home	<input type="text"/>	<input type="checkbox"/>
Work	<input type="text"/>	<input type="checkbox"/>
Fax	<input type="text"/>	<input type="checkbox"/>

I do not wish to receive marketing and promotional material from the Participant

**Tax File Number (TFN) or Exemption Code (optional)**

Providing your TFN is not compulsory, but if you do not, tax may be taken out of your interest at the highest marginal tax rate plus Medicare levy.

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**Online Access (Optional)**

Nominate a Username and Temporary Password below (if you have an existing Username this will be used)

Username (6 to 16 alphanumeric characters)

If your nominated Username is already in use, we will nominate a similar alternative on your behalf.

Temporary Login Password (6 to 16 alphanumeric characters, and must not contain the word "password")

You **must** provide a Temporary Login Password for online access. Please make a note of the Temporary Login Password you have nominated. You will be asked to change your Password upon your first login.

**Identification**

Select one of the options below:

If you have an existing trading account with us, please provide your Username

I will attach certified copies of identification (Your identification documents must be in the exact same details as those provided in this form. See the *Identification Documentation Requirements* available from the website for more information.)

**Section 7 – Change of SMSF/Trust Account Designation**

Please provide an abbreviated version of the full name of the trust (up to 23 characters, including spaces).

The words or reference to "trust", "as trustee for", "trustee", "ATF", "Testamentary" should not be used in Account Designation as it will not be accepted by CHESS.

A/C

Please attach a certified copy of the front page of the Trust deed containing the trust name (and a deed of amendment if applicable) and showing the trustee's signature and witness signatures (if formal trust).



If there is a change to the trustee/s operating the account you are required to open a new trading account.

**Section 8 – Declaration & Signature/s**

**All authorised signatories must sign this declaration for your instructions to be executed.**

- I/We authorise you to act in accordance with my/our instructions;
- I/We declare that the information provided on this form is true and correct and that the law prohibits the use of false names, as well as the giving or use of false documents in connection with an identification procedure.

**For new Company Director/Secretary**

- I/We acknowledge that I/we have received and agree to be bound by the Share Trading Terms and Conditions and consent to the collection, use and exchange of my/our personal information as set out in the Customer Information and Privacy section of the Share Trading Terms and Conditions available from the website.

Name of Account Holder 1/Director/Secretary 1/ Trustee 1

Name of Account Holder 2/Director/Secretary 2/Trustee 2

If there are more than 2 authorised signatories, please photocopy this page and attach to the form.