


Broker to Broker Transfer Form

Mason Stevens Limited ABN 91 141 447 207 AFSL 351578

Mason Stevens Super ABN 34 422 545 198 RSE Registration Number R1004168

Trustee: Diversa Trustees Limited ABN 49 006 421 638 RSE License Number L0000635 AFSL License 235153

 Please use block letters and complete all sections of this form.

Name of New Sponsoring Broker

1

Full Company Name

PID

Name of Existing Intermediary

2

Name of Existing Sponsoring Broker

3

Existing Broker Contact Details

4

Name

Contact Number

Holder Identification Number (HIN) or other unique identifier

5

HIN

PID

Account Name

6

Account Designation

7

Registered Address

8

Address Street

Suburb

State

Postcode



Holdings to be Transferred

9

All Holdings Selected Holdings – Please list holdings below

ASX Code	Security Name & Description	No of Securities	Tax Date	Cost*
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Authorisation

10

I/We authorise and direct my sponsoring broker/intermediary to transfer my/our shareholdings in accordance with the ASX Business Rules

Individual or Securityholder 1/Executor 1

Securityholder 2/Executor 2

Securityholder 3/Executor 3

Director/Sole Director and
Sole Company Secretary

Director/Company Secretary

Sole Director (No Company Secretary)*

Date

* By signing here I,

warrant that, pursuant to the Corporations Act, the company does not have a Company Secretary and that as the Sole Director I am authorised by the company to complete this form.

Please include a spreadsheet of the latest Unrealised CGT statement. Mandatory information includes Security Code, Purchase Date, Units held and Total Cost of each Tax Lot. **If this information is not provided in a spreadsheet there may be a delay in the transfer process.**

Please return the completed and signed form to Mason Stevens by:
Email: wealth@masonstevens.com.au | Fax: 02 8270 0298
Post: Mason Stevens Level 26, 420 George Street, Sydney NSW, 2000

