

 This form uses JavaScript for optimal performance. Please ensure you have this enabled if completing electronically.
Refer to the end of this document for [submission instructions](#).

Which Company or Trust Details Need to be Updated?

Company name

Where do the Changes Need to be Applied?

<input type="checkbox"/>	Apply to all accounts held with AUSIEX.								
<input type="checkbox"/>	OR apply to the following accounts only:								
	<table><tr><th>Account number</th><th>Your account reference – <i>Account name or type</i></th></tr><tr><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td><input type="text"/></td><td><input type="text"/></td></tr></table>	Account number	Your account reference – <i>Account name or type</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Account number	Your account reference – <i>Account name or type</i>								
<input type="text"/>	<input type="text"/>								
<input type="text"/>	<input type="text"/>								
<input type="text"/>	<input type="text"/>								
<input type="checkbox"/>	ALSO apply address and contact detail updates to personal profile of:								

New Company Details

New Registered Business Address – *If applicable*

Street address – *Cannot be a PO Box*

Suburb State Postcode

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Country – *If not Australia*

New Principal Place of Business Address – *If applicable*

☐ Same as registered business address

Street address – *Cannot be a PO Box*

Suburb State Postcode

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Country – *If not Australia*

New Postal Address

– *If applicable*

☐ Same as registered business address

Street address

Suburb State Postcode

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Country – *If not Australia*

New CHESS Address

– *If applicable*

☐ Same as new postal address

Street address

Suburb State Postcode

<input type="text"/>	<input type="text"/>	<input type="text"/>
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Country – *If not Australia*

Contact Details

Email address

Business contact number

Change of Company Name

New company name


We will perform an ASIC search to verify the new name using the existing ACN/ABN number

Change of SMSF / Trust Account Designation

The words "Trust", "as Trustee for", "Trustee", "ATF", "Testamentary" should not be used in account designation as it will not be accepted by CHESS – 23 character limit including spaces

AC

Where a Trust Deed exists (formal Trust), excluding SMSFs, please attach a certified copy of the Deed of Amendment.

 If there are any changes to the trustees operating the account you will be required to open a new trading account.

Declaration and Acknowledgement

1. I/We declare that the information provided on this form is correct and I understand that it is an offence to provide false or misleading information.
2. I/We request that your records be updated to reflect the changes indicated.
3. I/We acknowledge that the information provided in this application or to my/our adviser is complete and correct. I/We will promptly notify AUSIEX of any changes to the information.
4. I/We acknowledge that AUSIEX may require further information from time to time and I/we agree to promptly provide AUSIEX with whatever additional information is reasonably required by AUSIEX.

Director / Secretary 1

Full name

Date – DD / MM / YYYY

Signature – Must be signed pen to paper

Director / Secretary 2 – If applicable

Full name

Date – DD / MM / YYYY

Signature – Must be signed pen to paper

How to submit your documents

Clients

Please provide your completed and signed form with relevant supporting documents to your adviser.

Advisers

Lodge this form and all supporting documents
ausiex.com.au > Administration > eSubmit

 1800 252 351  service@ausiex.com.au  ausiex.com.au

