Transfer shares from another broker to Selfwealth

This form is to transfer all or part of your existing holdings to Selfwealth.

Once completed and signed, please return the form along with a copy of all account holders' ID to **support@selfwealth.com.au.** Please note, some brokers request their clients to provide certified copies of their ID. Find out more about Certified ID here.

If you need any help along the way, you can also send questions to the email address above or via Live Chat.

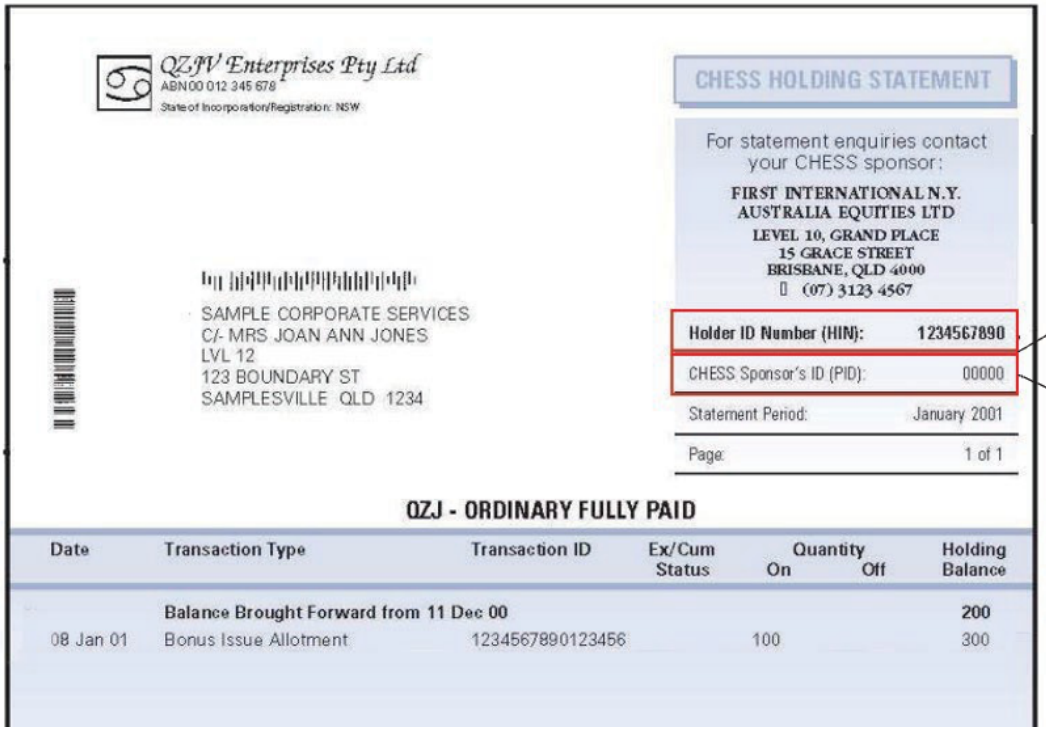
Checklist before signing

For your transfer to be processed without delay please ensure:

- ☐ All security holders requesting the share transfer have signed this document **WITH AN INK PEN.**
- ☐ Photo ID of all account holders is attached. Check with the delivering broker if your documentation must be certified.
- ☐ You must not have any outstanding orders or pending trade settlements for the shares you wish to transfer.
- ☐ The correct HIN and PID from the delivering broker have been referenced. Refer to page 1.

Example of a CHESS statement

Please find your latest statement for your existing shares and have it handy.



QZJV Enterprises Pty Ltd
ABN 00 012 345 678
State of Incorporation/Registration: NSW

SAMPLE CORPORATE SERVICES
C/- MRS JOAN ANN JONES
LVL 12
123 BOUNDARY ST
SAMPLESVILLE QLD 1234

CHESS HOLDING STATEMENT

For statement enquiries contact your CHESS sponsor:
FIRST INTERNATIONAL N.Y. AUSTRALIA EQUITIES LTD
LEVEL 10, GRAND PLACE
15 GRACE STREET
BRISBANE, QLD 4000
(07) 3123 4567

Holder ID Number (HIN):	1234567890
CHESS Sponsor's ID (PID):	00000
Statement Period:	January 2001
Page:	1 of 1

QZJ - ORDINARY FULLY PAID

Date	Transaction Type	Transaction ID	Ex/Cum Status	Quantity On	Quantity Off	Holding Balance
	Balance Brought Forward from 11 Dec 00					200
08 Jan 01	Bonus Issue Allotment	1234567890123456		100		300

Holder Identification Number (HIN) - The unique number attached to your securities. A HIN consists of an X followed by 10 digits.

Participant Identification Number (PID) - Your existing broker's unique identifier. Our PID is 03772.

Selfwealth by Syfe

Stock Transfer Form

1. Your Selfwealth account details

To find this information you can login to your Selfwealth account. Select the correct portfolio in the left column, scroll down to TRADE, and select Trading Account then Account Details.

Your Selfwealth ID *Not your HIN*

S-

Selfwealth trading account name

2. Your details at the other broker

For your transfer to be successful, please ensure that the registration details match between brokers. If not, you will need to contact your other broker to update your registration details, or authorise Selfwealth/FNZ to update your details on our end so that the transfer can be processed without delay or rejection. Please note, you cannot add or remove account holders from any account.

If your broker is a custodian, please include your Account ID in the HIN section of the form.

Please refer to page 1 if you are unsure of where to find these details.

Sponsoring broker

Broker PID

Your account name

Account designation *if applicable*

<

A/C >

Your registered address

State

Postcode

HIN/Account ID at the other broker *Max. 11 digits*

☐ In the event of mismatched registration details, I authorise Selfwealth/FNZ to make changes to my CHESS registered name and/or address details in accordance with the information on my trading account.

3. List the holdings you would like to transfer below

This form is for ASX-listed securities only. Extra rows are available on page 4.

Ticker code	Full company or fund name	Quantity of shares/units
EG. SWF	Selfwealth Pty Ltd	30

4. Signatures

I/We authorise Selfwealth/FNZ Custodians (Australia) to transfer the above listed holdings into my/our Selfwealth Trading Account.

Digital signatures are not accepted. Please ensure you sign the form with a pen. All account holders must sign. For company accounts, sign in accordance with the company's constitution.

Account holder 1

Date

Signature

Digital signature not accepted

Account holder 2

Date

Signature

Digital signature not accepted

Selfwealth by Syfe

Stock Transfer Form

Use this page if you need to add additional securities to step 3

Ticker code	Full company or fund name	Quantity of shares/units
EG. SWF	Selfwealth Pty Ltd	30

Signatures

I/We authorise Selfwealth/FNZ Custodians (Australia) to transfer the above listed holdings into my/our Selfwealth Trading Account.

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Account holder 1

Date

Signature

Digital signature not accepted

Account holder 2

Date

Signature

Digital signature not accepted