



## Issuer Holdings Transfer Request

Complete this form to transfer issuer-sponsored holdings to your Selfwealth trading account.

'Issuer-sponsored' holdings are shares that are not sponsored under CHESS with a broker, but are allocated at a share registry.

**For your conversion to be successful, the registration details on your issuer-sponsored statements must match with your CHESS registration details, including joint names, account designation (if applicable), and address.**

- If your issuer holding is registered differently, contact the share registry to amend the registration.
- Your CHESS registration details are located by selecting your Selfwealth account avatar (top right) > Settings > Locate the details under 'My Portfolios'

Once completed and signed (by all authorised signatories), return to **support@selfwealth.com.au** along with the following:

1 x copy of all account holders ID	1 x copy of your latest issuer-holding or dividend statement(s) dated within the last three months	<b>For your first Issuer Sponsored Transfer request:</b> 1 x selfie of each account holder holding their ID with their face visible, including a piece of paper with the current date
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These are your details at the share registry. Check to ensure the name and address are the same as your CHESS registration details at Selfwealth.

Selfwealth Limited  
ABN: 52 154 324 428 AFSL 421789

All Registry Communications to:  
Link Market Services Limited  
Locked Bag A14  
Sydney South NSW 1235 Australia  
Telephone: +61 1300 554 474  
Facsimile: +61 2 9287 0303  
Security Code: SWF  
Email: registrars@linkmarketservices.com.au  
Website: www.linkmarketservices.com.au

MR. JOHN SMITH  
1/1 MELBOURNE STREET  
MELBOURNE VIC 3000

SECURITYHOLDER  
REFERENCE NUMBER (SRN): 10000000000

STATEMENT DATE: 03/04/2023

SWF - FULLY PAID ORDINARY SHARES  
ISSUER SPONSORED HOLDING STATEMENT

DATE	TRANSACTION TYPE	INCREASE	DECREASE	HOLDING BALANCE
03/04/2023	OPENING BALANCE			0
	Option Exercised	30	0	
	CLOSING BALANCE			30

**LINK**  
MARKET SERVICES

NOTE: The closing balance shown includes all transactions registered as at end of day on the date indicated. Securityholders should not rely on the balance shown in this statement as being a complete record of their current holding and the issuer will not be liable for any financial loss incurred by a securityholder who relies on the balance shown without making their own adjustments for any transfers relating to market and off market transactions which have yet to be registered.

Please note your Securityholder Reference Number (SRN) recorded above. This SRN must be used in all communications with the company or registry and with your stockbroker when buying or selling these securities. This statement is an important document and should be kept in a safe place. If lost or destroyed a charge will be levied for a replacement statement. Full terms and conditions of the above securities can be obtained from the registry.

THE AUSTRALIAN TAXATION OFFICE (ATO) ADVISES YOU TO KEEP THIS STATEMENT. DISPOSAL OF SECURITIES MAY LEAD TO CAPITAL GAINS TAX. PHONE THE ATO ON 1300 720 092 IF YOU NEED THE "GUIDE TO CAPITAL GAINS TAX".

This is where to find your Security Holder Reference Number (SRN).

Please ensure that the copy of the SRN statement provided was issued **within the last three months**.

This would be your latest balance available to transfer.

## Your Selfwealth account details

Selfwealth ID

Account name

Account designation *if applicable*

Registered address



Ticker code <i>ASX only</i>	Security name	Shareholder Reference Number (SRN)	Quantity of shares/units
EG. SWF	Selfwealth Ltd	I00000000000	30

## Agreement & Acknowledgement

I/We authorise Selfwealth/FNZ Custodians (Australia) to transfer all the above listed issuer-sponsored holdings to my/our Selfwealth HIN.

**Digital signatures are not accepted. Please ensure the form is signed with an ink pen. No whiteout to be used otherwise the form will be deemed invalid. All account holders must sign.**

Account holder 1




Signature

*Digital signature not accepted*

Account holder 2




Signature

*Digital signature not accepted*

Selfwealth Ltd. ACN 154 324 428 AFSL 421789 Level 7, 130 Lonsdale Street, Melbourne, VIC, 3000.  
The ASX Clearing, Trading & Settlement Participant for Selfwealth is FNZ Custodians (Australia) Pty Ltd. PID 03772  
Level 1, 99 Elizabeth Street, NSW, 2000. ABN 88 624 689 694 AFSL 507452