



Marcus Today SMA | Company | Investor Details Form

To invest into the Marcus Today SMA within your Company, complete the following information sheet, and return it with a copy of Company Certificate of Incorporation, along with 100 points of personal identification (all documents are required to be certified).

Director 1: Given Name(s) & Salutation				
Director 1: Surname				
Director 1: Date of Birth				
Director 2: Given Name(s) & Salutation				
Director 2: Surname				
Director 2: Date of Birth				
Company Name				
Company ABN				
Company TFN				
Company ACN				
Registered Address				
Postal Address				
Contact Number – Landline				
Contact Number – Mobile				
Email				
Marcus Today SMA Model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Marcus Today SMA (Growth SMA)		Marcus Today Equity Income SMA	
Initial investment amount (\$50,000 minimum)	\$		\$	
Reinvest dividends within SMA model or pay to nominated bank account?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Reinvest	Paid Out	Reinvest	Paid Out
Initial investment made via Direct Debit or Bpay?	Direct Debit / BPay			
Regular investment amount (if applicable)	\$			
Nominated external bank account (mandatory)	Account Name: BSB: Account Number:			

The service you have requested is Execution Only. By sending us this form, you acknowledge that your personal circumstances and financial situation have not been taken into consideration. You only seek assistance in investing into the Marcus Today SMA in accordance to the above completed Applicant Details.

Return the completed form along with ID documentation to sma@marcustoday.com.au or fax to (03) 9867 2131