



## Marcus Today SMA | Individual | Investor Details Form

To invest into the Marcus Today SMA within your personal name(s), please complete the following information sheet, and return it with 100 points of personal identification (all documents are required to be certified).

Individual 1: Given Name(s) & Salutation				
Individual 1: Surname				
Individual 1: Date of Birth				
Individual 1: TFN				
Individual 2: Given Name(s) & Salutation				
Individual 2: Surname				
Individual 2: Date of Birth				
Individual 2: TFN				
Residential Address				
Postal Address				
Contact Number – Home				
Contact Number – Mobile				
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marcus Today SMA Model	Marcus Today SMA (Growth SMA)		Marcus Today Equity Income SMA	
Initial investment amount (\$50,000 minimum)	\$ <input type="checkbox"/>	<input type="checkbox"/>	\$ <input type="checkbox"/>	<input type="checkbox"/>
Reinvest dividends within SMA model or pay to nominated bank account?	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](mailto:sma@marcustoday.com.au) or fax to (03) 9867 2131