



Marcus Today SMA | Trust | Investor Details Form

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

Signatory 1: Given Name(s) & Salutation			
Signatory 1: Surname			
Signatory 1: Date of Birth			
Signatory 2: Given Name(s) & Salutation			
Signatory 2: Surname			
Signatory 2: Date of Birth			
Trust name (as per Trust Deed)			
Trust TFN			
Trust ABN			
Trustee name			
Trustee ACN (if applicable)			
Registered Address			
Postal Address			
Contact Number – Landline			
Contact Number – Mobile			
Email			
Marcus Today SMA Model	<input type="checkbox"/> Marcus Today SMA (Growth SMA)	<input type="checkbox"/> 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"/> Reinvest	<input type="checkbox"/> Paid Out	<input type="checkbox"/> Reinvest <input type="checkbox"/> 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