

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	
Postal Address	
Contact Number – Home	
Contact Number – Mobile	
Email	
Marcus Today SMA Model	Marcus Today SMA (Growth SMA) Marcus Today Equity Income SMA
Initial investment amount (\$50,000 minimum per SMA model)	\$ \$
Reinvest dividends within SMA model or pay to nominated bank account?	Reinvest Paid Out Reinvest Paid Out 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.

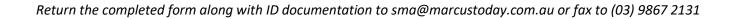
Return the completed form along with ID documentation to sma@marcustoday.com.au or fax to (03) 9867 2131



Source of wealth and funds

Please circle your main source(s) of wealth and funds (i.e. assets and property) from the table below:

Wealth
 Salary/Wages Divorce settlement Family trust/Inheritance Donation/Gift Grant/Subsidy Insurance/Settlement proceeds Investment income Lottery/Gambling Pension/Social benefits payment(s) Royalties Sale of property or investments Spouse/Partner Other (please specify):





100 Points of Identification Guide

Documentation required to meet the 100-point proof of identity:

Primary Documents	Choose (0-1)	Points
You Must Provide either:	Australian Passport	70
 one primary document 	Australian birth certificate (not an extract) or birth card	70
or	Australian citizenship certificate	70
 At least one secondary document that includes a photograph. 	International Passport	70

Secondary Documents	Choose (0-1)	Points
Your initial document from this group will be awarded 40 points	Australian driver licence or learners permit (current)	40
	Australian photo firearms licence	40
	State or federal government employee identity	40
	Centerlink or social security card (current)	40
	Department of veteran's affairs card	40
	Tertiary education institution photo identity	40

Secondary Documents Continued	Choose (0-3)	Points
	Australian driver licence or learners permit (current)	25
All documents in this group will attach 25 points. Only one card from each institution may be counted.	Australian photo firearms licence	25
	State or federal government employee photo identity	25
	Centerlink or social security card (current)	25
	Department of veteran's affairs card	25
	Tertiary education institution photo identity	25
	Proof of age card	25

Secondary Documents Continued	Choose (0-4)	Points
	Medicare card	25
	Property lease / rental agreement	25
All documents in this group	Council rate notice	25
will attach 25 points.	Property insurance papers	25
	A utility bill	25
Only one card from each	Motor vehicle registration / insurance	25
institution may be counted.	Professional or trade association card	25
.,	A financial institution debit / credit card	25
	A financial institution passbook / statement	25