



## 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 2: Given Name(s) & Salutation	
Individual 2: Surname	
Individual 2: Date of Birth	
Individual 1: TFN	
Individual 2: TFN	
Residential Address	
Postal Address	
Contact Number – Home	
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 per SMA model)	\$ <input type="text"/> \$ <input type="text"/>
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)	\$ <input type="text"/>
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

## 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	Funds
<ul style="list-style-type: none"><li>• Salary/Wages</li><li>• Divorce settlement</li><li>• Family trust/Inheritance</li><li>• Donation/Gift</li><li>• Grant/Subsidy</li><li>• Insurance/Settlement proceeds</li><li>• Investment income</li><li>• Lottery/Gambling</li><li>• Pension/Social benefits payment(s)</li><li>• Royalties</li><li>• Sale of property or investments</li><li>• Spouse/Partner</li> <li>• Other (please specify):</li></ul>	<ul style="list-style-type: none"><li>• Salary/Wages</li><li>• Divorce settlement</li><li>• Family trust/Inheritance</li><li>• Donation/Gift</li><li>• Grant/Subsidy</li><li>• Insurance/Settlement proceeds</li><li>• Investment income</li><li>• Lottery/Gambling</li><li>• Pension/Social benefits payment(s)</li><li>• Royalties</li><li>• Sale of property or investments</li><li>• Spouse/Partner</li> <li>• Other (please specify):</li></ul>

## 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: • one primary document or • At least one secondary document that includes a photograph.	Australian Passport	70
	Australian birth certificate (not an extract) or birth card	70
	Australian citizenship certificate	70
	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 veterans' affairs card	40
	Tertiary education institution photo identity	40

Secondary Documents Continued	Choose (0-3)	Points
All documents in this group will attach 25 points.  Only one card from each institution may be counted.	Australian driver licence or learners permit (current)	25
	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
All documents in this group will attach 25 points.  Only one card from each institution may be counted.	Medicare card	25
	Property lease / rental agreement	25
	Council rate notice	25
	Property insurance papers	25
	A utility bill	25
	Motor vehicle registration / insurance	25
	Professional or trade association card	25
	A financial institution debit / credit card	25
	A financial institution passbook / statement	25