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	☐ Marcus Today SMA (Growth SMA)		☐ Marcus Today Equity Income SMA	
Initial investment amount ($20,000 minimum per SMA model)	$		$	
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 or fax to (03) 9867 2131

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 • Australian birth certificate (not an extract) or birth card • Australian citizenship certificate • International Passport	70 70 70 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) • Australian photo firearms licence • State or federal government employee identity • Centerlink or social security card (current) • Department of veterans affairs card • Tertiary education institution photo identity	40 40 40 40 40 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) • Australian photo firearms licence • State or federal government employee photo identity • Centerlink or social security card (current) • Department of veterans affairs card • Tertiary education institution photo identity • Proof of age card	25 25 25 25 25 25 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 • Property lease / rental agreement • Council rate notice • Property insurance papers • A utility bill • Motor vehicle registration / insurance • Professional or trade association card • A financial institution debit / credit card • A financial institution passbook / statement	25 25 25 25 25 25 25 25 25

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