

Additional Details

Application Form

Please use this form to provide details if there are more than two Trustees, Directors, Individuals or Beneficial Owners for an Investment.

ADDITIONAL APPLICANT DETAILS

Please complete all details in full.

A beneficial owner is an Individual who ultimately owns or controls 25% or more of the Investor.

Investor Name / Entity:

Is this applicant a:

☐ Trustee ☐ Director ☐ Individual ☐ Beneficial Owner

If Trustee or Director, are they a beneficial owner?

☐ Yes ☐ No

If an Individual, please provide TFN:

Title:

Legal first name:

Middle names:

Legal last name:

Date of birth:

Country of citizenship:

Residential Address:

Street:

State:

Postcode:

Suburb:

Country:

Mobile phone:

Home phone:

Email address:

Is this Entity a sophisticated Investor for the purpose of Chapter 6D of the Corporations Act (2001) or a wholesale client for the purposes of Chapter 7 of the Corporations Act (2001)?

☐ Yes ☐ No ☐ Unsure

If this Trustee or Director is a Beneficial owner please select the Source of Investment Funds:

☐ Gainful employment ☐ Inheritance / gift
☐ Business activity ☐ Financial investments
☐ Superannuation saving ☐ Other

Would you like this person to have access to the investment in the Registry Investor Centre?

☐ Yes ☐ No

Would you like this person to receive monthly fund updates via email?

☐ Yes ☐ No