

# CFS Edge Investments

## Account closure form

SAVE FORM

PRINT FORM

This form can be used to fully withdraw and close your Investment account.

Mark appropriate answer boxes with a cross like the following . Start at the left of each answer space and leave a gap between words. All fields marked with an asterisk (\*) are mandatory and are required for us to complete your request.

Please upload the completed form to the Document Library via our online portal.  
Telephone (for assistance) 1300 769 619

### 1 ACCOUNT DETAILS

\*Account number

\*Account name

### 2 CLOSURE PAYMENT DETAILS

**Note:** Any amendments to bank details must be initialled.

\*Branch number (BSB)

 - 

\*Account number

\*Name of bank account

Does this account hold suspended funds, outstanding redemptions and/or corporate actions that may prevent this transaction being processed in one amount?

No (continue to **Section 3**)

Yes

Transfer as much as possible now and the remainder when it is available in the cash account

Transfer the whole amount once it is available in the cash account

If no selection is made above, we will transfer the **whole amount once it is all available in the cash account unless there are suspended funds that are not immediately redeemable**. In those cases we will transfer all available cash once all liquid funds have been redeemed.

### 3 DECLARATION

I/We authorise and acknowledge:

- the full withdrawal and closure of the account to be paid as instructed on this form,
- the sell-down of all assets on the account and transfer the balance as cash, and
- that relevant tax consequences may result from the liquidation of assets, where applicable.

Account Signatory 1 signature

Name

Date

Account Signatory 2 signature

Name

Date

### 3 DECLARATION (CONTINUED)

Account Signatory 3 signature

Name

Date

Account Signatory 4 signature

Name

Date



If you complete this declaration with a wet signature, please submit a copy of your certified ID to accompany this request.