

Change of Name Form

Issued by:
WealthHub Securities Limited

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You can use this form to change name details on individual, joint, company or trust accounts.

Please use black or blue pen and write in CAPITALS. If you need help completing this form, please call us on 13 13 80.

Section 1

Change of personal name (for individual accounts)

nabtrade user ID

Current Details

Title

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)

Middle name(s)

Any other name

Family name(s)

New Details

Title

☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)

Middle name(s)

Any other name

Family name(s)



Company – To change your company name, please provide a signed request with a certified copy of the change of company name certificate.



Trust – To change your trust name, please provide a signed request with a certified copy of the Deed of Amendment.



Section 2

Supplying certified copies* of supporting documents

*A **certified copy** is a document that has been certified as a true copy of an original document by an approved certifier.

Please make sure all of your identification documents are current and contain your full name. You'll need to show your original identification documents and **photocopies** of them to an approved certifier.

Change of personal name – you'll need to provide certified copies of documentation to support your name change:

| | |
|---|--|
| Change of personal name due to marriage | Certified copy of your marriage certificate |
| Change of personal name due to divorce | Certified copy of decree nisi and/or original certified copy of your birth certificate |
| Change of personal name due to formal name change | Certified copy of change of name certificate |
| Add middle name | Certified copy of acceptable form of identification (listed on page 2) showing your name details |
| Change of personal name due to error | Certified copy of acceptable form of identification (listed on page 2) showing your correct name details |

Acceptable form of identification for personal name change:

- Australian driver's licence
- Australian passport (can be expired within the preceding two years but not cancelled)
- NSW photo card
- Proof of age card (card issued under a State or Territory for the purpose of proving a person's age and containing a photograph of the person)

Change of Company/Trust name – you'll need to provide a certified copy of the change of company name certificate.

Who's an approved certifier?

A person listed in Part 1 or Part 2 of the Statutory Declarations Regulations 2018, including:

- A judge
- A chief executive officer of a Commonwealth court
- A notary public
- An agent of the Australian Postal Corporation who is in charge of supplying postal services to the public
- A permanent employee of the Australian Postal Corporation with 2 or more years of continuous service

who is employed in an office providing postal services to the public

- A legal practitioner
- A magistrate
- A registrar or deputy registrar of a court
- A police officer
- An Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955)
- A finance company officer with 2 or more years of continuous service
- A Justice of the Peace

Accountant who is:

(a) a fellow of the National Tax Accountants' Association; or

(a) a member of any of the following:

- (i) Chartered Accountants Australia and New Zealand;
- (ii) the Association of Taxation and Management Accountants;
- (iii) CPA Australia;
- (iv) the Institute of Public Accountants

Or

- An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- An officer with, or a credit representative of, a holder of an Australian credit licence, having 2 or more years of continuous service with one or more licensees
- A person in a foreign country who is authorized by law in that jurisdiction to administer oaths or affirmations or to authenticate documents.

What does an approved certifier need to do?

On each page of the **photocopy**, the approved certifier needs to do **all** of the following:

- Write the text, 'This is to certify that this is a true copy of the original document which I have sighted'
- Write the date on which the document was certified
- Sign the copy
- Print their full name and full address
- Note the position that allows them to certify the document; for example, 'police officer', and
- Write their registration number (if applicable).



Section 3

Signatures

I authorise WealthHub Securities to make the changes provided in this form. I acknowledge that these instructions supersede all previous change of name details.

Account Holder

Given name(s) / Family name (PLEASE PRINT)

Signature



Date / /

Section 4

Next Steps

Please complete and return this form and certified identification documents (copies or faxes won't be accepted) to:

Post: nabtrade
GPO Box 4545
Melbourne VIC 3001