



# Macquarie inactive low-balance account election form

**Complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS.**

Please complete this form if you would like to keep your Macquarie account open. The election you make in this form will be valid for a period of 16 months.

Please return this signed form to us by scan and email to [wrsolutions@macquarie.com](mailto:wrsolutions@macquarie.com) or by mail to **Macquarie Investment Management Limited, Reply Paid 85744, Sydney NSW 2001** (in your own envelope, no stamp is required).

## When to use this form?

You should complete this form if you have an inactive low-balance account and want this account to remain with us.

If your inactive low-balance account remains with us your retirement savings will continue to be subject to fees and charges.

## Things you should know

We need to receive this form 30 days before the statement dates, which are the dates we are required to report these accounts to the ATO. These dates are either 31 October or 30 April each year.

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## Account details

Account number:

Account name:

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## Signature

By completing and signing this form, you acknowledge that you are informing Macquarie Investment Management Limited that you elect for the above account to not be an inactive low-balance account.

Signature:

Name:

Phone:

Email:

Date:

This information is provided by Macquarie Investment Management Limited ABN 66 002 867 003, AFSL 237492 ("Macquarie"). In deciding whether to acquire or continue to hold a Macquarie account, you should consider the relevant offer document available on our website or upon request.

We will handle your personal information in accordance with our Privacy Policy available on our website.

This information does not take into account your objectives, financial situation or needs and you should consider whether it is appropriate for you.