

# Transfer form

Use this form if you would like to transfer all or part of your existing holdings to another existing Vanguard Investor.



Please refer to the relevant Product Disclosure Statement and the Vanguard Personal Investor - Investor Guide for more details.



**Questions?**

Call 1300 655 101 (Australia) or (+61) 3 8888 3888 (Overseas). Vanguard Client Services are available from 8am to 6pm Monday to Friday (Melbourne time)

**Section 1.** Transfer from (must be completed)

**Transferor** (please complete the section below)

Account number <input type="text"/>	Phone number (We will call you on this number if we need additional information) <input type="text"/>
Investor name <input type="text"/>	

**Section 2.** Transfer to (if applicable)

**Transferee** (please complete the section below)

Account number <input type="text"/>	Phone number (We will call you on this number if we need additional information) <input type="text"/>
Investor name <input type="text"/>	

**Please note:** Your distribution option will default to reinvestment.



#### Section 4. Signatures and Declaration (must sign in wet ink)

Vanguard is committed to respecting the privacy of your personal information. We collect, use and disclose the personal information you provide in order to make any requested changes to your account(s) and provide you with products and services. If you do not provide all of the information requested, we may not be able to proceed with making these changes. Our Privacy Policy at [www.vanguard.com.au/privacy](http://www.vanguard.com.au/privacy) and our Privacy Notification set out more details about how and why we collect, use and disclose your personal information, how to correct any information which is inaccurate or out of date, and our privacy complaints process.

#### Transferor

By signing below you are confirming that you are authorised to provide us with these instructions and that we have your signatures on file.

Transferor 1	Transferor 2
Signature 	Signature 
Name <input type="text"/>	Name <input type="text"/>
Date (DD/MM/YYYY) <input type="text"/>	Date (DD/MM/YYYY) <input type="text"/>
Position (please select one) <input type="checkbox"/> Investor <input type="checkbox"/> Director <input type="checkbox"/> Trustee	Position (please select one) <input type="checkbox"/> Investor <input type="checkbox"/> Director <input type="checkbox"/> Trustee
Other (please specify) <input type="text"/>	Other (please specify) <input type="text"/>
<input type="checkbox"/> I/We authorise for Vanguard to transfer the assets specified above from my account to the nominated transferee account,	
<input type="checkbox"/> I/We also release, discharge and agree to indemnify Vanguard and its funds for any losses, liabilities, actions, proceedings, accounts, claims and demands in respect of any liabilities arising out of this respect.	

## Transferee

Transferee 1	Transferee 2
Signature <input type="text"/>	Signature <input type="text"/>
Name <input type="text"/>	Name <input type="text"/>
Date (DD/MM/YYYY) <input type="text"/>	Date (DD/MM/YYYY) <input type="text"/>
Position (please select one) <input type="checkbox"/> Investor <input type="checkbox"/> Director <input type="checkbox"/> Trustee Other (please specify) <input type="text"/>	Position (please select one) <input type="checkbox"/> Investor <input type="checkbox"/> Director <input type="checkbox"/> Trustee Other (please specify) <input type="text"/>
<input type="checkbox"/> I/We authorised for Vanguard to transfer the assets specified above from the transferor account to my account. <input type="checkbox"/> I/We also release, discharge and agree to indemnify Vanguard and its funds for any losses, liabilities, actions, proceedings, accounts, claims and demands in respect of any liabilities arising out of this respect.	



**Before you submit**

## Checklist

**Before you submit your application, please ensure:**

- You have signed the declaration boxes in this form.
- You have attached certified identification documents

## Certification requirements

**Important:** When having copies of documents certified you should show both the original document and a copy to the eligible certifier. Please refer to our certification guide [https://fund-docs.vanguard.com/AU-Vanguard\\_Certification\\_guide.pdf](https://fund-docs.vanguard.com/AU-Vanguard_Certification_guide.pdf)

## How to submit your form



You can return your completed form in the mail or send us a scanned copy via Vanguard Online secure message. Please do not mail this form if you have already uploaded it.



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