

Beneficial owner details

1 General information		
What type of application are you applying for? Please		
 ¹ If corporate trustee, please provide BO details of corporate trustee. ² Complete section 3 and 4 for the trust and section 2 if the trustee is a corporate trustee. 		
Beneficial owner details		
1. Beneficial Owner (BO) or Key Controlling Person (KCP) Full name:	2. Beneficial Owner (BO) or Key Controlling Person (KCP)	
Owner/shareholder OR Key Controlling Person – please advise of role	Owner/shareholder OR Key Controlling Person – please advise of role	
Is the BO/KCP a signatory to the Application? ³ Yes \blacktriangleright <i>go to 3</i> No, please provide the details below Date of birth / /	Is the BO/KCP a signatory to the Application? ³ Yes \blacktriangleright <i>go to 3</i> No, please provide the details below Date of birth $//$	
Full address	Full address	
Are you an Australian resident for tax purposes? No Yes Are you a resident of another country for tax purposes? No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.	Are you an Australian resident for tax purposes? No Yes Are you a resident of another country for tax purposes? No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.	
3. Beneficial Owner (BO) or Key Controlling Person (KCP)	4. Beneficial Owner (BO) or Key Controlling Person (KCP)	
Owner/shareholder OR Key Controlling Person – please advise of role	Owner/shareholder OR Key Controlling Person – please advise of role	
Is the BO/KCP a signatory to the Application? ³ Yes \blacktriangleright go to 3 No, please provide the details below	Is the BO/KCP a signatory to the Application? ³ \bigcirc Yes \blacktriangleright <i>go to 3</i> \bigcirc No, please provide the details below	
Date of birth / /	Date of birth / /	

³ Expectation is that Signatories have been identified and verified and details provided as part of the application.

Beneficial owner details (continued)

3. Beneficial Owner (BO) or Key Controlling Person (KCP)	4. Beneficial Owner (BO) or Key Controlling Person (KCP)
Full address	Full address
Are you an Australian resident for tax purposes? 🗌 No 🗌 Yes	Are you an Australian resident for tax purposes? 🗌 No 🗌 Yes
Are you a resident of another country for tax purposes?	Are you a resident of another country for tax purposes?
No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.	No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.

3 Key Controlling Person

To be completed for all Trusts that are not subject to the oversight of an Australian statutory regulator.	
1. Beneficial Owner (BO) or Key Controlling Person (KCP)	2. Beneficial Owner (BO) or Key Controlling Person (KCP)
Full name:	Full name:
Role:	Role:
Is the KCP a signatory to the Application?* Yes ► go to 4 No, please provide the details below Date of birth: / / Full address	Is the KCP a signatory to the Application?* Yes ▶ go to 4 No, please provide the details below Date of birth: / Full address
Are you an Australian resident for tax purposes? No Yes Are you a resident of another country for tax purposes? No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.	Are you an Australian resident for tax purposes? No Yes Are you a resident of another country for tax purposes? No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.
3. Beneficial Owner (BO) or Key Controlling Person (KCP)	4. Beneficial Owner (BO) or Key Controlling Person (KCP)
Full name:	Full name:
Role:	Role:
Is the KCP a signatory to the Application?*	Is the KCP a signatory to the Application?*
Yes ► go to 4 No, please provide the details below Date of birth: /	Yes ▶ <i>go to 4</i> No, please provide the details below Date of birth: $//$
Full address	Full address
Are you an Australian resident for tax purposes? No Yes	Are you an Australian resident for tax purposes? No Yes
Are you a resident of another country for tax purposes?	Are you a resident of another country for tax purposes?
No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.	No Yes, complete the <i>Individual Macquarie identification</i> form, authorised advisers complete the <i>Individual FSC/FPA</i> form, or complete the <i>Tax details</i> form.

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We may collect, hold, use and disclose personal information you provide in this form to process the application. Without this information, we may not be able to process the application. We may exchange this information with other companies in the Macquarie Group as well as our service providers and with regulatory authorities. Our Privacy Policy contains further details about our handling of personal information, including how you may access or update personal information and how we deal with your concerns. The Privacy Policy can also be found via macquarie.com.au.