

This Application form is to be used to transfer shares from a deceased Hepburn Energy Member to beneficiaries. Applicants (proposed transferee beneficiaries) may be new or existing members of the Cooperative.

Each beneficiary will need to complete an individual Deceased Estate Share Transfer Application form unless applying for a joint account.

Depending on the size of the shareholding to be transferred other completed forms and documents may be required. Please refer to the [Hepburn Energy Share Deceased Estate Booklet](#) found on the memberships page of our website- www.hepburnenergy.coop/membership - under official member documents for a checklist of required documents.

Application details:

New memberships applications:

All new memberships, as per the rules, will be evaluated by the board individually.

Existing member applications:

Existing members should ensure that their Shareholder Reference Number (SRN) and shareholding names (as they appear on the applicant's Statement of Holdings) are entered. The member must make sure that all of their shareholding details are up to date prior to completing this form.

Joint applications:

In general, Hepburn Energy prefers two individual applications over a joint application, however, joint applications will be received without prejudice. Joint applications must list the full names of both individuals and include each tax file number (TFN). Please note that only the first named applicant on the joint membership is the voting member.

Applications from minors:

Minors may be members of Hepburn Energy however under the Co-operatives Act minors are not eligible to stand for election or vote until they reach the age of 18 years. Parents may enter their own TFN and bank details if the child does not have these. Parents should seek their own advice as to whether any member returns they receive need to be declared as part of their income.

Signatures:

Subject to compliance with applicable law, this document may be executed electronically and an executed facsimile or electronic copy of the same will serve as a legal and binding arrangement with the same force and effect as the original

Instructions:

- Follow the instructions and arrows to complete the appropriate sections of the form
- Please use a computer or a **BLACK** pen printed in capital letters inside the boxed areas
- Where a choice is required, mark the box with an 'X'
- Hepburn Energy Rules & Disclosure Statements can be found at www.hepburnenergy.coop/membership/ and must be read by any new member applicants prior to applying



Email completed form to: info@hepburnenergy.coop

OR Post completed form to: Hepburn Energy, PO Box 225, Daylesford VIC 3460

PLEASE TICK ONE OF THE FOLLOWING:

☐

The proposed transferee beneficiary is a new membership applicant

GO TO  **NUMBER 1.**

☐

The proposed transferee beneficiary is an existing member shareholder

GO TO  **NUMBER 4.**

1. NEW MEMBER DETAILS: Please only complete if you are applying to be a NEW MEMBER

Entity Type: Please tick one of the following and complete the matching section

☐

Individual

☐

Joint

* If the transferee beneficiary is an entity other than an individual or joint please contact community@hepburnenergy.coop

Individual Application Please Complete if applying as an individual member/shareholder:

Applicant Name: _____

Tax File Number: _____

Date of Birth (dd/mm/yyyy): _____ ABN (only if sole trader): _____

Residential Address: _____

Town/Suburb: _____ State: _____ Postcode: _____ Country: _____

Postal Address: _____
(If differs from above)

Town/Suburb: _____ State: _____ Postcode: _____ Country: _____

Email (required): _____

Phone: _____

Joint Application Please Complete if applying as an joint membership/shareholding:

Applicant 1 Name: _____

Tax File Number: _____ Date of Birth (dd/mm/yyyy): _____

Applicant 2 Name: _____

Tax File Number: _____ Date of Birth (dd/mm/yyyy): _____

Applicant 3 Name: _____

Tax File Number: _____ Date of Birth (dd/mm/yyyy): _____

Applicant 4 Name: _____

Tax File Number: _____ Date of Birth (dd/mm/yyyy): _____

If there are further joint applicants please add details to the end of this form

Joint Application Continued...

Primary Contact Name: _____

Residential Address: _____

Town/Suburb: _____ State: _____

Postal Address: _____
(If differs from above)

Town/Suburb: _____ State: _____ Postcode: _____ Country: _____

Email (required): _____

Phone: _____ Postcode: _____ Country: _____

2. NEW MEMBER BANK ACCOUNT DETAILS:

Payment Details: All new applicants must complete this section - future member returns will be made to the account nominated here

Account Name: _____

Bank: _____

BSB: _____

Account Number: _____

3. NEW MEMBER DECLARATIONS:

New Member Declarations:

- ☐ I/We acknowledge that lodging this application form constitutes an offer to subscribe for shares in Hepburn Energy
- ☐ I/We have read through the Hepburn Energy New Member Information Booklet and associated Disclosure Statement, Rules and further documents.
- ☐ I/We apply for membership of Hepburn Energy. I/We will maintain my/our active membership status as defined in the Rules and explained in the Disclosure Statement.

Signature: _____ Date: _____

Signature 2: _____ Date: _____
(If joint account)

Signature 2: _____ Date: _____
(If joint account)

Signature 2: _____ Date: _____
(If joint account)

GO TO NUMBER 5.

4. EXISTING MEMBER DETAILS: Please only complete if the beneficiary is/are an EXISTING MEMBER(S)

Shareholding Name: _____

Security Reference Number (SRN): _____

Declarations:

☐ I/We acknowledge that lodging this application form constitutes an offer to subscribe for shares in Hepburn Energy

Signature: _____ Date: _____

Signature 2: _____ Date: _____
(If Joint Account)

Signature 3: _____ Date: _____
(If Joint Account)

Signature 4: _____ Date: _____
(If Joint Account)

GO TO NUMBER 5.

5. SHARE TRANSFER DETAILS:

Shareholding Name of Deceased Estate: _____

Security Reference Number (SRN) of Deceased Estate: _____

Quantity of Shares for Transfer: _____

☐ I/We the executors or administrator of issued Letters of Administration for the estate or Next of Kin do hereby transfer to the above name/s hereinafter called the transferee/s, the securities as specified above standing in the deceased estate's name in the books of Hepburn Energy, subject to the several conditions on which were held at the time of signing hereof and I/We the transferee beneficiary(s) do hereby agree to accept the said securities subject to the same conditions.

Executor/Administrator/Next of Kin
(delete one) Signature: _____ Date: _____

Executor/Administrator/Next of Kin
(delete one) Signature: _____ Date: _____

Beneficiary (Transferee) Signature: _____ Date: _____

Beneficiary (Transferee) Signature: _____ Date: _____
(If Joint Account)

Beneficiary (Transferee) Signature: _____ Date: _____
(If Joint Account)

Beneficiary (Transferee) Signature: _____ Date: _____
(If Joint Account)



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Further Application Notes:

Please add further note here if the space provided in the form was insufficient