Request to consolidate holdings

Application form

Use this form to merge two or more of your holdings in the same company. The registered names and address on each holding **must** match exactly.

If the names differ only because one is missing a middle name, attach a certified copy of that holder's current driver licence or passport to confirm your details.

Submit your form

BY EMAIL
registry@sharesies.com

BY MAIL
Sharesies Registry
PO Box 6833, Victoria Street West, Auckland 1142

A Registered holder details

If the names on the CSNs (or Holder Numbers) differ only by a missing middle name, attach a certified copy of the holder's current driver licence or passport to confirm their full name.

Full name(s) of registered holder(s), exactly as shown on the register

Mobile number

Other phone number (Optional)

Registered address, exactly as shown on the register

Unit/Level

Street number

Street name (or PO Box)

Suburb/town/city

Postcode

Country

Email address

By adding your email, you'll get your communications sooner—we'll email them instead of posting them.

B CSNs (or Holder Numbers) to merge

When you merge holdings, you choose one CSN (or Holder Number) to keep, and your other holdings move into it.

The settings on the number you keep stay as they are. That includes its bank account details, IRD number, communication preferences, reinvestment plan, and FIN.

Settings on your other CSNs (or Holder Numbers) won't carry over, so check that the number you keep has the details you want.

First CSN (or Holder Number) to merge

Second CSN (or Holder Number) to merge

Third CSN (or Holder Number) to merge



CSN (or Holder Number) to keep

C Security/investment details to merge

- [ ] Merge ALL holdings under Sharesies Registry Limited
- [ ] Only merge the holdings that I've listed below.

Company/issuer in which the investment is held: