

# PORTFOLIO LENDING TRANSFER IN HOLDINGS REQUEST

BELL POTTER CAPITAL LIMITED

## BELL POTTER

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### FACILITY DETAILS

Facility Name	
Facility Number	Bell Potter Capital PID: 20306
Contact Phone Number	Mobile Number

### BROKER SPONSORED HOLDINGS DETAILS

Other Broker's Name	
Broker Sponsored HIN	Broker PID (if known)

### FULL NAME & REGISTERED ADDRESS OF HOLDINGS (or attach a current copy of CHESS Statement)

Full Name of Broker Sponsored Holder			
Number and Street			
Suburb	State	Postcode	Country

### TRANSFER IN FROM ANOTHER BROKER - Please tick one (1) of the following options

- A  Please transfer my HIN and ALL my sponsored holdings. This will retain my existing Tax File Number and dividend payment instructions. (If you already hold shares as security for a margin loan in the above registered name, option B must be selected. **Or**
- B  Please transfer PART of my sponsored holdings as indicated below. This may require me to re-nominate my dividend payment instructions as well as re-submit my Tax File Number.

### TRANSFER IN FROM ANOTHER BROKER

- C  Please transfer in my Issuer Sponsored Holdings as indicated below or as shown on the attached CHESS statements.

SRN	Stock Code or Name	Number of Units

### AUTHORISATION

Name 1	Signature
Date (dd/mm/yyyy) / /	
Name 2	Signature
Date (dd/mm/yyyy) / /	

Please ensure that you have completed all sections, or attached a copy of the latest CHESS Statement(s).

### OFFICE USE ONLY

Client No	Signature	A/C Manager	Date	Processed by
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