

# Adviser Express New Account Form

**Is this a new account:**

- Yes. (please mail completed account opening forms and client identification)
- No, existing Bell Potter Securities Account Number \_\_\_\_\_

Date

To: Luke Cameron

Fax: 07 3295 2683

E-Mail: lcameron@bellpotter.com.au

**A. FROM:**

Contact \_\_\_\_\_ Adviser Code \_\_\_\_\_  
Company \_\_\_\_\_ Default Brokerage Rate \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
Address \_\_\_\_\_

**B. CLIENT DETAILS:**

Surname / Company Name \_\_\_\_\_  
Full given name(s) \_\_\_\_\_  
A/C Designation (if applicable) < \_\_\_\_\_ >  
Postal Address \_\_\_\_\_  
Street Address (**COMPULSORY**) \_\_\_\_\_  
Registration address (if different) \_\_\_\_\_  
Bus \_\_\_\_\_ Home \_\_\_\_\_ Mob \_\_\_\_\_ Fax \_\_\_\_\_  
Client E-mail address \_\_\_\_\_

**C. SPECIAL INSTRUCTIONS**

**ADDITIONAL C/NOTE INSTRUCTIONS**

Number of copies \_\_\_\_\_  
Name \_\_\_\_\_  
Address \_\_\_\_\_ Postcode \_\_\_\_\_  
Contract E-mail Address \_\_\_\_\_  
Fax number (if required) \_\_\_\_\_

**D. ORDERS**

Buy/Sell	QTY	ASX CODE	Limit	SRN/HIN	Brokerage

**E. SETTLEMENT DETAILS**

Cheque  BPAY  CMT/E-Bank  CMT/DDR (Attach DDR)

Account Name: \_\_\_\_\_  
Bank: \_\_\_\_\_  
BSB: \_\_\_\_\_ Account No: \_\_\_\_\_

**CLIENT SIGNATURE**

**ADVISER SIGNATURE**

**DATE**