

# HOW TO COMPLETE AN APPLICATION FORM

## BELL POTTER

### RESIDENTIAL AND MAILING ADDRESSES

Please note that we are required to collect a residential address/registered office address for the account holder(s).

### ATTORNEYS

If you are signing under power of attorney, please provide identification and attach a certified copy of the power of attorney and specimen signature(s) of the attorney(s) if not displayed on the document.

### OPENING AN ACCOUNT ON BEHALF OF OTHERS

If you are investing for:	Documentation required# (to accompany the application form)	Your account name must be in the name of:	Complete application for sections... (names are used as examples only)  Please use appropriate salutation (Mr, Mrs, etc)
<b>A Superannuation Fund</b>	A certified† copy of an extract of the Trust Deed identifying the parties to the Trust	The Trustees of the Superannuation Fund*	<b>Individuals:</b> 1 Mary Citizen and John Sample Citizen 2 <Citizen Superannuation Fund A/c > <b>Companies:</b> 1 James Citizen Pty Ltd 2 <Citizen Pty Ltd Superannuation Fund A/c>
<b>A Trust</b>	A certified† copy of an extract of the Trust Deed identifying the parties to the Trust	The Trustees of the Trust	1 Mary Citizen and John Sample Citizen 2 <Citizen Family A/c>
<b>A Deceased Estate</b>	A certified† copy of the grant of probate or Letters of Administration	The Executors of the Estate	1 Mary Citizen 2 <Estate of the late Agnes Sample A/c>
<b>A Minor</b> (less than 18 years old)		The Trustees of the Trust	1 Mary Citizen and John Sample Citizen 2 <Baby Citizen A/c>
<b>A Partnership</b>	A certified† copy of an extract of the Partnership Agreement identifying the parties to the partnership	The Principals of the Partnership	1 Mary Citizen 2 Jesse Citizen
<b>A Company</b>	A certified† copy of the Certificate of Registration	The name of the Company	1 ABC Company Pty Ltd
<b>An Incorporated Body</b>	A certified† copy of the Certification of Registration and meeting minutes that show which officers can open and operate the account	The name of the Incorporated Body	1 XYZ Sample Inc.

# Additional documentation may be required in some circumstances.

\* Applications in the name of a trust, rather than the trustee, will not be accepted.

† A certified copy is a copy which is certified as being a true and accurate copy of the original by a Justice of the Peace or professional, such as a lawyer or certified practising accountant.

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INFORMATION REQUIRED	DETAILS	
<b>Applicant(s) Details</b>	Individuals	Use appropriate salutations and given names, DO NOT use initials, eg. Mrs Mary Joy Smith
	Joint Application	Use appropriate salutations and given names, DO NOT use initials, eg. Mrs Mary Joy Smith & Mr Harry Reginald Right
	Company, Incorporated Association or Body	Name of Company, Incorporated Association or other Body. Please provide the Tax File Number (TFN) and ABN/ACN of the Company, Incorporated Association or other Body if available
	Trust or other Entity	Please supply full name of all Trustees, the Family Trust, Superannuation Fund, Business Name or Unincorporated Association. Please provide the entity's TFN or reason for exemption if available
<b>Account Designation</b>	Citizen Superannuation Fund A/c>, <Estate of the Late Agnes Sample A/c>, <Citizen Family A/c>	
<b>Residential Address/ Registered Office</b>	Individuals/Companies	A residential address or registered office address must be quoted. A separate mailing or PO Box address may be supplied
<b>Contact Details</b>	A business/home or mobile number must be provided	
<b>Execution by the Applicant</b>	Individuals	The individual in whose name the account is opened should sign
	Joint Application	Application(s) should be signed by all persons who will be deemed joint tenants
	Trusts	The appointed Trustee
	Superannuation Fund	Corporate Trustee – Directors of Company
	Deceased Estate	Executors of the Estate
	Unincorporated Body	Appointed Officers must sign. The officers might be titled President, Chairman, Secretary, Treasurer etc. Officers must specify their title
<b>Execution by the Applicant</b>	Companies	These accounts must have two signatures, with the officers stating the office held as 'Director' or 'Secretary' (there must be one Director) <b>OR</b> one signature with the officer signing stating the office held as 'Sole Director and Sole Company Secretary' <b>OR</b> two signatures without the office stated, but with the company seal affixed
<b>Deed of Guarantee and Indemnity</b>	Companies	Guarantee and Indemnity must be completed by a Director/Guarantor and witnessed