

It's time to get your financial and tax records in order with **Bell Potter's Portfolio Administration Service (PAS).**

Bell Potter's PAS delivers the best of both worlds – we take care of all paperwork associated with administering your investment portfolio, but leave full control of the management of your portfolio in your hands.

Our specialist team of experienced investment administrators manage all the day-to-day administration, take up corporate actions, and provide income and capital gains tax (CGT) reporting. You receive comprehensive quarterly reporting, and a consolidated annual tax report that you can simply forward to your accountant.

PAS is designed to be used in conjunction with your Bell Potter Adviser, who will work with you to understand your financial and investment objectives.

This premium service is exclusively offered to Bell Potter clients.

Key benefits

- + Outsource administration and retain control over investment decisions
- + A comprehensive annual tax report you can simply forward to your accountant
- + Consolidated income and CGT reporting
- + 24/7 online access to view your portfolio at your convenience
- + Mailbox service for all correspondence relating to your investments
- + Administration of a wide range of investments
- + Customised advice provided by your Adviser

Speak to your Bell Potter Adviser to learn how PAS can help you reduce the administration burden associated with your investments.

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Disclaimer: This flyer has been provided for information purposes only. The flyer does not take into account the investment objectives, financial situation and needs of any particular investor. These matters should be considered when deciding whether the investment is appropriate. Before opening an account with Bell Potter you will need to carefully consider the appropriate Product Disclosure Statement or information booklet. V200624

