

INTRODUCING THE BELL FINANCIAL TRUST.

The Bell Financial Trust is an all-in-one account designed to act as both a core at-call hub account for your share trading with Bell Potter as well as an at-call investment account which offers a competitive interest rate.

With a combination of functionality and flexibility, the Bell Financial Trust allows you to efficiently manage the flow of at-call funds related to your investment activity.

Key features and benefits

- **At-call convenience**
Ready access to funds so you can take advantage of opportunities as they arise.
- **Competitive rates**
Competitive at-call interest rate. The current rate is 0.05% p.a.*
- **No minimum balance and no fees**
With no minimum balance requirements and no fees, you can focus on making optimal trading decisions, while still earning a competitive interest rate.
- **Regular interest payments**
Interest is calculated daily and paid monthly.
- **Monitor your balances online via client access**
You can monitor balances and access historical transactions online at www.bellpotter.com.au.
- **Direct credit/BPAY**
You will be provided with a BSB/Biller code and unique account/reference number for your unit allowing you to transfer funds to your account. This allows you to direct credit funds (e.g. salary, dividends or other income).
- **Integrate with other Bell Potter accounts**
Your account can be linked to Bell Potter accounts, including your equity, options and futures accounts. You can authorise Bell Potter to settle all share, commodity and derivative transactions to your unit value, ensuring the fast, efficient and automatic settlement of your trades.
- **No additional charges**
No additional charges incurred for audit confirmation letters and annual income summaries for tax returns.
- **Ability to easily sweep funds**
Easy sweep of funds between nominated accounts enabling same day transfers.
- **Phone and email instructions accepted**
If you have already established a nominated bank account (in the application form or via a signed instruction to us) we will accept phone or email instructions to transfer funds to that account.
- **Account Management**
Direct access to professional service and support from your dedicated account manager.

Learn more

For more information on the Bell Financial Trust, please contact your adviser or call 1800 062 308.

You can also find out more information from the Bell Financial Trust PDS and additional information available on our website www.bellpotter.com.au.

The target market determination for the Bell Financial Trust can be obtained free of charge by calling Bell Potter Capital Ltd on 1800 061 327 or visiting www.bellpotter.com.au/bellfinancialtrust.

*Interest rates are subject to change. Our current interest rate can also be found on our website www.bellpotter.com.au. Current interest rates are not a reliable indicator of future interest rates.

The Bell Financial Trust (ARSN 164 391 119) is a managed investment scheme that is registered with ASIC. The Trust Company (RE Services) Limited ABN 45 003 278 831 AFSL No. 235150 is the responsible entity of the Trust. The Trust is administered by Bell Potter Capital Limited ABN 54 085 797 735 AFSL No. 360457. The Trust Company (RE Services) Limited is a wholly owned subsidiary of Perpetual Limited (ABN 86 000 431 837).

Bell Financial Trust is secured over the assets of Bell Potter Capital. Guarantee details and associated risks are disclosed in our PDS.

The information provided in this document is general information only and does not constitute investment or other advice. The content of this document does not constitute an offer or solicitation to subscribe for units in the Fund.

Any investment decision in connection with the Trust should only be made based on the information contained in the disclosure document for the Fund. Neither Bell Potter Capital nor Perpetual guarantee repayment of any particular rate of return from the Fund.

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