

Introducing the Bell Potter Account Keeping Fee

A transparent fee to ensure we continue to provide the highest quality advice and service.

We are committed to providing you with the highest quality advice and service. To assist with meeting the increasing costs of complying with all regulatory and professional requirements of establishing and holding an account with Bell Potter, we're introducing a transparent account keeping fee.

The account keeping fee contributes to the costs associated with ongoing technological investment to meet changing regulatory and client demands, managing comprehensive administrative systems and processes, meeting significant training requirements, regulatory levies, and infrastructure costs.

What you get

The account keeping fee provides you the following:

- Direct market access to domestic and all major global share markets, 24 hours a day.
- Access to an adviser with trade execution and account sponsorship.
- Access to Bell Potter's secure website, including 24-hour access to your portfolio, highly regarded research, live share price data and customised watchlists.
- Opportunities to participate in IPOs, placements and other corporate transactions.
- Access to experts in fixed income, listed managed funds and technical financial advice.

What you pay

The account keeping fee is \$990.00 p.a. incl. GST, charged monthly. Fees for this service may be tax deductible - please confirm this with your taxation specialist.

You will be invoiced on the first business day of every month and will be pro-rated for the first month from the business day following the return of the acknowledgement. The amount will be debited from your nominated bank account with Bell Potter.

The fee payable is an annual agreement between 1 July through to 30 June. You will be required to opt-in to the subsequent year prior to 30 June. The fee will be pro-rated for the remainder of the year if commenced prior to June.

You may cancel anytime and the fee and service will cease at the end of that month.

Next steps

The account keeping fee will ensure we can continue to provide the highest quality advice and service. If you have any questions, please do not hesitate to contact your adviser.