

PORTFOLIO LENDING FIXED LOAN INSTRUCTION

BELL POTTER CAPITAL LIMITED

BELL POTTER

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Client Name

Portfolio Lending Facility Number

Bell Potter Client Account Number

DETAILS OF THE LOAN TO BE FIXED FOR 12 MONTHS

By using this form, you are requesting a fixed rate, pre-paid loan for 12 months. We will establish this loan in the second half of June 2025 with a maturity date in late June 2026*. Details of your fixed loan will be provided on your June 2025 statement.

Loan amount of

\$

Interest rate

% p.a.

* For information on applicable interest rates or for help completing this form, please call your Account Manager on 1800 061 327.

Please select your preferred payment method below (please tick option)

☐

A

The interest amount will be charged to your variable loan account.

You may wish to pay this amount by cheque or by electronic funds transfer.

☐

B

Please add the interest amount to the loan amount specified above.

This will result in a total fixed loan amount equal to the loan amount shown above, plus the cost of interest capitalised to that loan.

If no selection is made for the preferred payment method, we will charge the interest amount to your variable loan account

PLEASE SIGN HERE

Client 1

Signature

Date (dd/mm/yyyy)

/ /

Client 2

Signature

Date (dd/mm/yyyy)

/ /

OFFICE USE ONLY

Client #	Surplus	Signature	A/C Manager	Approved	Processed	Date
Commencing	/ /	Maturing	/ /	Days		

Fixed Interest		Interest Ledger	Maximum Liability	Verified
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Shares A/C No.	A/C No. (Facility ID)	Fixed A/C Instruction
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