

# BELL FINANCIAL TRUST QUESTIONNAIRE



Please complete this questionnaire if you wish to invest in the Bell Financial Trust independently, without linking your investment to a trading account or secured loan facility.

## 1. INVESTOR CATEGORY

Please confirm what category of investor you are. You must select one option. Failure to complete this will result in your application being rejected:

- ☐ Wholesale Investor (as defined by section 761G of the Corporations Act 2001)
- ☐ Platform Provider
- ☐ A Retail investor (as defined in the Corporations Act) that has received personal financial advice in respect to the Fund
- ☐ A Retail investor (as defined in the Corporations Act) who has not received personal financial advice in respect of the Fund

To assist the RE in meeting the Design and Distribution Obligations (DDO) you are required to indicate your consumer attributes in response to each of the questions set out below. Please ensure all questions are completed and you must select only one answer for each question otherwise your application will be rejected. These attributes should reflect your current objectives, financial situation and needs.

**WARNING:** If unsure on how to complete, we recommend you seek financial advice.

## 2. WHAT IS YOUR PRIMARY INVESTMENT OBJECTIVE?

- ☐ Capital Growth
- ☐ Capital preservation
- ☐ Income distribution

## 3. WHAT IS YOUR INTENDED USE OF THIS IN INVESTMENT IN YOUR OVERALL INVESTMENT PORTFOLIO?

- ☐ Standalone portfolio up to 100%
- ☐ Major allocation up to 75%
- ☐ Core component up to 50%
- ☐ Minor allocation up to 25%
- ☐ Satellite component up to 10%

## 4. WHAT IS YOUR TOLERANCE FOR RISK (ABLE TO BEAR LOSS)?

- ☐ Extremely high
- ☐ Very high
- ☐ High
- ☐ Medium
- ☐ Low

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## 5. WHAT IS YOUR INVESTMENT TIME HORIZON?

- ☐ Up to and including 2 years i.e. Short term
- ☐ More than 2 years but less than 5 years i.e. Medium term
- ☐ Equal to 5 years but less than 7 years i.e. Medium to long term
- ☐ Equal to 7 years or more i.e. Long term

## 6. WHAT DO YOU ANTICIPATE YOUR WITHDRAWAL NEEDS?

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Yearly
- ☐ More often than one year

## 7. WHERE DID YOU HEAR ABOUT THE FUND?

- ☐ Financial Adviser
- ☐ Platform
- ☐ Research House
- ☐ Other. Please specify below: