

CHANGE OF NAME/NAME CORRECTION FORM

BELL POTTER SECURITIES LIMITED

BELL POTTER

PLEASE COMPLETE AND RETURN TO:
Bell Potter Securities Limited
GPO Box 4718, Melbourne VIC 3001
Facsimile 03 9256 8787

1. CLIENT DETAILS

Bell Potter Account Number(s)

Bell Potter Name(s)

Account Designation (if applicable)

2. ACCOUNTS - Do you have any of the following accounts? (please insert account numbers)

Cash Account

Margin Lending

Option

Fixed Interest

International

Other

3. CHANGE OF NAME DETAILS - Please note, we require supporting documentation outlined below to action your request.

New Personal Name

Title

Surname

Given Name(s)

Old Signature

New Signature

New Company Name

Company Name

4. SIGN HERE - Please provide Signatures of all account holders to execute instructions

Individual/Applicant 1/Company Director/Sole Director

Signature

Date (dd/mm/yyyy)

/ /

Individual/Applicant 2/Company Director/Sole Director

Signature

Date (dd/mm/yyyy)

/ /

PLEASE PROVIDE CERTIFIED COPIES OF THE FOLLOWING DOCUMENTS TO SUPPORT THE CHANGE

Type of Change

Support Documentation

Change of individual name due to marriage

Original certified copy of marriage certificate
Original certified Photo ID showing correct name details

Change of individual name due to divorce

Original certified copy of decree nisi
Original certified copy of marriage certificate; and
Original certified Photo ID showing correct name details

Change of individual name due to formal name change

Original certified copy of Change of Name certificate along with
certified copy of ID showing new name and signature

Add or remove middle name

Photo ID showing requested name details

Change of individual name due to error

Photo ID showing correct name details

Change of company name

Original certificate copy of change of company name certificate

PLEASE TURN OVER...

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A person* who is authorised to certify documents must sight the original and the copy and make sure both documents are identical, then make sure all pages have been certified as true copies by writing or stamping 'certified true copy' followed by their signature, printed name, qualification (e.g. Justice of the Peace, Police Officer, etc.) and date.

***The following can certify copies of the originals as true and correct copies:**

- A Justice of the Peace;
- A finance company officer with two or more years of continuous service (with one or more finance companies);
- An officer with, or authorised representative of, a holder of an Australian Financial Services Licence (AFSL), having two or more years continuous service with one or more licensees;
- A notary public office;
- A police officer;
- A permanent employee of Australia Post with two or more years of continuous service;
- A registrar or deputy registrar of a court;
- A person enrolled on the roll of a State or Territory Supreme Court or the High Court of Australia, as a legal practitioner;
- An Australian consular officer or an Australian diplomatic officer;
- A judge of a court;
- A magistrate;
- A Chief Executive Officer of a Commonwealth court;
- A member of the Institute of Chartered Accountants of Australia, CPA Australia or the National Institute of Accountants with two or more years of continuous membership; or
- An agent of Australia Post in charge of supplying postal services.