

# PORTFOLIO LENDING REFINANCE REQUEST

BELL POTTER CAPITAL LIMITED

## BELL POTTER

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Please use this form if you wish to refinance an existing margin loan.

Facility name with Bell Potter Capital Porfolio Lending

Existing Margin Lending provider

Contact name of existing provider

Contact number of existing provider

Existing facility name

Existing account number

Please choose one (1) of the following options

**A**  Please transfer my HIN/s and ALL my sponsored holdings. This will retain my existing Tax File Number and dividend payment instruction **OR**

**B**  Please transfer PART of my sponsored holdings as indicated below. This may require me to re-nominate my dividend payment instructions as well as re-submit my Tax File Number.

Stock Code (if known)	Stock Name (please attach a list if insufficient space below)	Number of Units

I/we authorise Bell Potter Capital to refinance my/our existing margin loan from the above provider.

I/we understand the implications of the above option selected and acknowledge that if I/we did not clearly indicate a particular option, then the transaction will be processed in accordance with Option A.

**Individual or Security holder 1**

Signature

Date (dd/mm/yyyy)

/ /

**Security holder 2**

Signature

Date (dd/mm/yyyy)

/ /

OFFICE USE ONLY

Sponsorship	Lodged	Reconciled
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