



# AUTOMATE

## YOUR DATA COLLECTION

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YOUR UNIQUE EMAIL FOR YOUR SMSF IS

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### AUTOMATE YOUR DATA COLLECTION

To authorise the automatic collection of your Contract Note data, BGL requires you to complete one of following options:

**Option 1)** Update your email address online through ANZ Account (**Recommended method**)

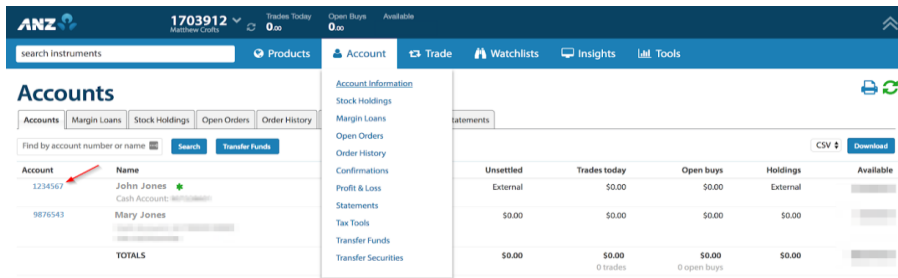
Please refer to **page 2** for further instructions.

**Option 2)** Paper based Change of Contact Details form

Please refer to **page 4** for Change of Contract Details Form

YOUR BROKER  
ANZ Share  
Investing  
1300 658 355  
GPO Box 5351  
Sydney NSW 2001  
Australia

- Once logged into your trading account, navigate to **Account | Account Information** and select the account you wish to add the unique email address for



- Under **Confirmations sent to** please click the +Add button next to **Emails** and enter the unique email address provided above
- Once you have entered the unique email address, please ensure to click the save icon

### Confirmations sent to:

Addresses	+ Add
Emails	+ Add
✓ johnjones@gmail.com	🗑️
✓ JonesSuperFund@bglnotes.com.au	🗑️
📘 Please save once all required changes are completed.	💾

- You will now be prompted to enter your 'Trading Pin'. Please enter your trading pin and click OK to complete the steps.

Please enter your trading pin:

Ok
Cancel

ANZ Share Investing Contract Note PDFs will require a password to view. This password will be

your account number (generally 8 numerical digits) which you can retrieve from the contract note in below highlighted field. Please provide this password to your fund administrator.



# SELL

Share Investing Limited (ABN 93 078 174 973, AFSL No. 238277) is the provider of the ANZ Share Investing service.  
242 Pitt St Sydney, NSW 2000. PO Box 1346, Royal Exchange, NSW 1224  
Phone: 1300 658 355 or +61 3 8541 0458 Email: [service@anzshareinvesting.com](mailto:service@anzshareinvesting.com)

## Tax Invoice Contract Note

<b>Mailing Address:</b>  BGL CORPORATE SOLUTIONS PTY LTD <BGL PENSION FUND A/C>, 606-608 HAWTHORN ROAD BRIGHTON EAST VIC 3187	<b>Recipient/Registration Address:</b> BGL CORPORATE SOLUTIONS PTY LTD <BGL PENSION FUND A/C>, 606-608 HAWTHORN ROAD BRIGHTON EAST VIC 3187
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Account Number:

Trade Placed By:

Contract Number:

**NOTE:** For trading account that is held by a company or corporate trustees, ANZ Share Investing will provide you with an authority form to fill out and signed before the contact details can be changed.



## CHANGE OF DETAILS form

### CURRENT ACCOUNT DETAILS

Client Account Number

Account Holder 1  
(or Company name) \_\_\_\_\_

Account Holder 2  
(if applicable) \_\_\_\_\_

Account Designation < \_\_\_\_\_ Account >  
(if applicable)

### NEW CONTACT DETAILS

Residential Address  
(PO Box not allowed) \_\_\_\_\_

Suburb/Town \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Postal Address  
 Same as above \_\_\_\_\_

Suburb/Town \_\_\_\_\_ State \_\_\_\_\_ Postcode \_\_\_\_\_

Contact Numbers  
Mobile (recommended) \_\_\_\_\_ Home \_\_\_\_\_

Work \_\_\_\_\_ Fax \_\_\_\_\_

Primary email \_\_\_\_\_  
To comply with the ASIC Market Integrity Rules the first email address must be that of the account holder.

Secondary email \_\_\_\_\_

I elect to automatically update ANZ CIA or ANZ Margin Loan details.

Please note that this form will change your details for your CHESS sponsored holdings with the Broker. This form will not change your details for any ISSUER SPONSORED holdings – you will need to contact the registry directly.

### CLIENT AGREEMENT

Date \_\_\_\_\_ / \_\_\_\_\_ / 20\_\_\_\_

	<b>Account Holder 1</b>	<b>Account Holder 2</b>
Client Signature(s)	_____	_____
Name(s) (printed)	_____	_____
Title (if company) e.g. director, officer, secretary	_____	_____

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