



# 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 the following form to be signed and returned to Implemented Portfolios.

Please complete the following sections:

- Account Name
- Account Number
- Email Address
- Signature

## **YOUR BROKER**

Implemented Portfolios

02 9241 5955

[info@implementedportfolios.com.au](mailto:info@implementedportfolios.com.au)

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Sydney NSW 2000

# BGL.

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A BNY MELLON COMPANY

PERSHING SECURITIES AUSTRALIA PTY LTD

ABN 60 136 184 962 AFSL No 338264

CHANGE OF CONTACT DETAILS FORM

Account Number [input]

Account Name [input]

Accounts to be updated:  Equities  Options

ADDRESS

Old Street Address: [input]

[input]

New Street Address: [input]

[input]

Should the New Street Address be your Registered Address for Securities?  Yes  No

Old Postal Address: [input]

[input]

New Postal Address: [input]

[input]

Should the New Postal Address be your Registered Address for Securities?  Yes  No

Please Note: If you tick Yes for both your Street Address and Postal Address to be the Registered Address, the Postal Address will be used.

CONTACT INFORMATION

Email Address: [input]

Should the email address noted above be used for Electronic Contract Notes?  Yes  No

Phone (H): [input]

Phone (W): [input]

Phone (M): [input]

Fax: [input]

SIGNATURE OF ACCOUNT HOLDERS

Full name [input]

Signature [input]

Date / /

Full name [input]

Signature [input]

Date / /

Full name [input]

Signature [input]

Date / /

\*ALL ACCOUNT HOLDERS MUST SIGN. FOR COMPANY ACCOUNTS, SIGN IN ACCORDANCE WITH THE COMPANY'S CONSTITUTION