



AUTOMATE

YOUR DATA COLLECTION

YOUR UNIQUE EMAIL FOR YOUR SMSF IS

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 Sage Wealth Management.

Please complete the following sections:

- Account Name
- Account Number
- Email Address
- Signature

YOUR BROKER

Sage Wealth Management
02 8004 2548
contact@sagewealthmanagement.com.au
Suite 502, Level 5
504 Pacific Highway
St Leonards NSW 2065

BGL.

Suite 2, 606-608 Hawthorn Road
PO Box 8063, Brighton East
Victoria 3187 Australia

T 1300 654 401
F (03) 9530 6964
E info@bglcorp.com.au
W www.bglcorp.com



A BNY MELLON COMPANY

PERSHING SECURITIES AUSTRALIA PTY LTD

ABN 60 136 184 962 AFSL No 338264

CHANGE OF CONTACT DETAILS FORM

Account Number

Account Name

Accounts to be updated:

Equities

Options

ADDRESS

Old Street Address:

New Street Address:

Should the New Street Address be your Registered Address for Securities?

Yes

No

Old Postal Address:

New Postal Address:

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:

Should the email address noted above be used for Electronic Contract Notes?

Yes

No

Phone (H):

Phone (W):

Phone (M):

Fax:

SIGNATURE OF ACCOUNT HOLDERS

Full name

Signature

Date

Full name

Signature

Date

Full name

Signature

Date

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