



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 you to complete the following steps:

If you are signing up:

During the sign-up process, go to **Contract Notes Details**, under **Additional email addresses** enter the email address and select **next**.

YOUR BROKER

SelfWealth Ltd
PO Box 199
Surrey Hills
VIC 3127
support@selfwealth.com.au

A screenshot of the 'SelfWealth TRADING' web interface. The page title is 'Contract note details'. It contains a form with the following elements: a navigation bar with tabs for 'INDIVIDUAL TRUSTEES', 'ACCOUNT DETAILS', 'OTHER INFORMATION', 'REVIEW', and 'SUBMIT'; a section for 'Contract note details' with instructions and a radio button to 'Receive contract notes by email'; a section for 'Additional email addresses' with a text input field containing 'UNIQUEEMAIL@BGLNOTES.COM.AU' and buttons for 'Add additional email' and 'Remove last email'; and a bottom navigation bar with 'Back', 'Next', and 'Save and continue later' buttons.

If you are updating email address to an existing SelfWealth account:

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

Please complete the **Change of Email Address for Contract Notes** section in the form at the end of this guide. You will be able to input more than one email address.

Example -

Change of Email Address for Contract Notes	
Current Email Address(es)	trustee@trustee.com.au
New Email Address(es)	trustee@trustee.com.au, UniqueEmail@bglnotes.com.au

Once the form below has been completed and signed by all relevant parties, please send the form back to support@selfwealth.com.au

Note: You will be able to download a copy of the **TRADING Change of Address** form via SelfWealth trading platform which located in the Documents and Forms section under the Trading Account menu.



Change of Address Notification

Use this form if you wish to update your CHESS registration address on your SelfWealth (OpenMarkets) account(s).

Once completed and signed (by all authorised signatories), return to support@selfwealth.com.au

Client Account(s) Details	
Account Number(s)	
Account Name(s)	
Change of CHESS Registered Address	
Current CHESS Registered Address	
New CHESS Registered Address	
Change of Email Address for Contract Notes	
Current Email Address(es)	
New Email Address(es)	

Authorisation	
Account Holder 1 Name (PRINT FULL NAME)	Signature
	x
Account Holder 2 Name (PRINT FULL NAME)	Signature
	x
Account Holder 3 Name (PRINT FULL NAME)	Signature
	x

*All account holders must sign. For company accounts, sign in accordance with the company's constitution.

Date
