

Fund Broker Nomination Form

Start saving on fees today by nominating 2020 DIRECTINVEST as your fund broker

Avoid entry fees on your existing investments by nominating 2020 DIRECTINVEST as your fund broker. List your investment details below and we'll have the fund manager code your account for a full rebate on all future entry fees. If you invested through a financial adviser, we will also remove any ongoing adviser service fees..

Your details

First Name/Company Name				
Family Name / Director's Name				
Street Address				
Suburb		State		Postcode
Contact Phone Number				
Email Address				

Investment details

Fund Manager Name (eg. Macquarie)	Account Name (eg. John Citizen)	Account Reference or Investor Number	Approximate value of Investment
			\$
			\$
			\$

Signatures

I/We request that the Fund Manager named above amend their records to indicate that 2020 DIRECTINVEST (Mason Stevens Asset Management Pty Ltd) is the appointed adviser for the listed investments. I/We understand 2020 DIRECTINVEST may receive a trailing commission based on my investment amount. I/ We understand that you will apply a 100% rebate on any entry fees in the form of additional units in the relevant fund that would otherwise be charged on future contributions I/we make to the above investments.

Signature

Signature

Print name

Print name

Date

Date

Fax 02 8273 2010

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