

Share trading in Wealthtrac Portfolio Service

- Investors have access to all ASX listed securities, including warrants.
- Margin lending on trading platform is available through Colonial Geared Investments.

If you would like to include the direct share trading facility on your Wealthtrac Portfolio Service, please

1. New clients should read the Wealthtrac Portfolio Service Guide and complete the application form.
2. Complete the Share Trading Authority form to set up your individual HIN and activate your account for share trading.

Once the facility has been set up, your share trade instructions may be submitted to the Wealthtrac help desk by fax (02) 4224 1901 for placement.

Important information

Adviser authority - Please note that although the Share Trading Authority form provides 2020 DIRECTINVEST with the authority to trade, 2020 will not be processing client transactions on behalf of clients.

Market at limit orders - A market at limit order is submitted to be executed at the current market price. If the order is only partially filled, the remainder of the order will remain open as a limit order with the limit price being equal or lower to the price at which the filled portion of the order is executed.

