

Please email your completed form to:
corporate@lynxadvisors.com.au



Experienced Investor Questionnaire

Client Full Name

Account Name

Account Designation

Address

Email

Mobile Phone

Educational /Professional
Qualifications

Experienced investors declaration issued under sections 708(10) & 761GA of the Corporations Act 2001 (Cth)

In order to be classified as an 'Experienced Investor', Lynx Advisors Ptd Ltd ACN 654 471 262 or the "Company" AFSL 456663 (BR Securities Australia Pty Ltd) must be satisfied on reasonable grounds that you have sufficient experience in using financial services and investing in financial products (investments). You must answer the questions yourself for the Company to be satisfied you have the relevant experience to invest in excluded offers.

Work / Business / Director experience (please list any relevant work experience that might help you demonstrate you are an Experienced Investor).

Investor experience (please list any relevant investment experience that might help you demonstrate that you are an Experienced Investor. Please provide details about any investments you have made in the past including deal type/years of experience and types of investments).

Client acknowledgment

I, _____ consider that I have the necessary previous experience in using financial services and financial products that allows me to assess:

- The services offered by Lynx Advisors Pty Ltd in relation to the proposed financial product;
- Value of services offered by Lynx Advisors Pty Ltd in relation to the financial products;
- The adequacy of information provided to me by Lynx Advisors Pty Ltd relating to the financial products.

I also consider that I have previous investment experience to assess:

- The merits of a financial product or service; and
- The value of a financial product or service; and
- The risks associated with holding the financial product; and
- Your own information needs; and
- The adequacy of information given by the licensee and product issuer to you.

By completing and submitting this request, I acknowledge that If I am signed off as an ‘Experienced Investor’, I will not receive from Lynx Advisors Pty Ltd any documentation such as a product disclosure document relating to financial products that would be required to be given to me if I was a retail client. Lynx Advisors Pty Ltd does not have any other obligation to me that it would have if I were a retail client as per section 761G of Corporations Act 2001.

On behalf of the client:

Client Signature

Client Name

Date _____

On behalf of Lynx Advisors Pty Ltd:

Director Signature

Director Name

Date _____