

# BT Classic Investment Funds

Updating the information in the Product Disclosure Statement

This Update, dated 12 March 2014, relates to the BT Classic Investment Funds Product Disclosure Statement (PDS) dated 6 September 2006 and the Third Supplementary PDS (SPDS) dated 1 July 2013. This Update is issued by BT Funds Management Limited ABN 63 002 916 458, AFSL 233 724 and BT Funds Management No. 2 Limited ABN 22 000 727 659, AFSL 233 720, and should be read together with the PDS and SPDS.

Privacy laws regulate the handling of personal information about individuals. This includes the collection, use, storage and disclosure of personal information. In light of changes to Australian privacy laws, we're updating the information we provide to you about how we manage your information.

The following Privacy Statement outlines how we collect, use, disclose and manage your personal information. It replaces the information under 'Protecting your privacy' in the Third Supplementary PDS (SPDS), and reflects changes to the Privacy Act effective from 12 March 2014. 'We', 'our', 'us' and any other defined terms have the same meaning as contained in the Third Supplementary PDS (SPDS).

## Privacy Statement

### Why we collect your personal information

We collect personal information from you so that we can provide you with a product or service, and manage your product or service. We may also use your information to comply with legislative or regulatory requirements in any jurisdiction, prevent fraud, crime or other activity that may cause harm in relation to our products or services and help us to run our business. We may also use your information to tell you about products or services we think may interest you.

If you do not provide all the information we request, we may no longer be able to provide a product or service to you.

### How we collect your personal information

We may collect your information from many places including your Application form, correspondence with you or your Financial Planner, our telephone calls with you or you using our website at [bt.com.au](http://bt.com.au) or emailing us. We may also collect your information from other members of the Westpac Group or from a service provider engaged to do something for us or another member of the Westpac Group. Our service providers typically include custodians, investment administrators, information technology advisers, mailhouses, auditors, legal advisers and consultants.

### Disclosing your personal information

We may disclose your personal information to other members of the Westpac Group, anyone we engage to do something on our behalf such as a service provider, other organisations that assist us with our business and any person who acts on your behalf in relation to your investment (such as your financial adviser).

We may disclose your personal information to an entity which is located outside Australia. Details of the countries where the overseas recipients are likely to be located are in the BT Privacy Policy.

As a provider of financial services, we have obligations to disclose some personal information to government agencies and regulators in Australia, and in some cases offshore. We are not able to ensure that foreign government agencies or regulators will comply with Australian privacy laws, although they may have their own privacy laws. By using our products and services, you consent to these disclosures.

### Other important information

We are required or authorised to collect personal information from you by certain laws. Details of these laws are in the BT Privacy Policy.

The BT Privacy Policy is available at [bt.com.au](http://bt.com.au) or by calling 132 135. It covers:

- ▶ how you can access the personal information we hold about you and ask for it to be corrected;
- ▶ how you may complain about a breach of the Australian Privacy Principles, or a registered privacy code and how we will deal with your complaint; and
- ▶ how we collect, hold, use and disclose your personal information in more detail.

The BT Privacy Policy will be updated from time to time.

Where you have provided information about another individual, you must make them aware of that fact and the contents of this Privacy Statement.

“Westpac Group” means Westpac Banking Corporation and its related bodies corporate.

We and members of the Westpac Group will use or disclose your personal information to contact you or send you information about other products and services offered by the Westpac Group or its preferred suppliers. If you do not wish to receive marketing communications from us please call us on 132 135.

### **For more information**

For more information, talk to your financial adviser or contact BT Customer Relations on 132 135 between 8.00am–6.30pm (Monday to Friday, Sydney time).

#### **IMPORTANT INFORMATION**

The information provided in this document is general information only. It does not take into account your investment objectives, financial position or needs. Before acting on the information, you should consider the appropriateness of the information having regards to your personal objectives, financial situation or needs. BT Funds Management Limited (BTFM) ABN 63 002 916 458, AFSL 233 724 and BT Funds Management No. 2 Limited (BTFM No.2) ABN 22 000 727 659, AFSL 233 720 are the Responsible Entities and issuer of units in the BT Classic Investment Funds. A Product Disclosure Statement (PDS) is available for the BT Classic Investment Funds and can be obtained by calling BT Customer Relations on 132 135, or visiting [bt.com.au](http://bt.com.au). You should obtain and consider the PDS before deciding whether to acquire, continue to hold or dispose of units in the BT Classic Investment Funds.

BTFM and BTFM2 are members of the Westpac Group. An investment in the BT Classic Investment Funds is not an investment in, deposit with or any other liability of Westpac Banking Corporation ABN 33 007 457 141 (the Bank) or any other company in the Westpac Group. It is subject to investment risk, including possible delays in repayment of withdrawal proceeds and loss of income and principal invested. Neither the Bank nor any other company in the Westpac Group has issued, stands behind or otherwise guarantees the capital value or investment performance of the BT Classic Investment Funds.

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Prepare for the best.



[bt.com.au](http://bt.com.au) 132 135