



Use this form to transfer a single investor between BT Retail Investments product advisers.

Complete this form using *black pen* – print in clear **CAPITAL LETTERS**

**1. INVESTOR DETAILS**

Investor number (mandatory)  
**C**   

**Investor A – Individuals, Joint Investors or Trustees**

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)  
  /   /

Daytime phone number      Mobile phone number  
 (    )                           

**Investor B – Joint Investors or Trustees**

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)  
  /   /

Daytime phone number      Mobile phone number  
 (    )                           

**Companies, Associations or Other Investors**

Full name of company, association or other investor

**Account reference**

Provide your account reference (where account is held on behalf of others)

**2. PREVIOUS ADVISER DETAILS**

BT Adviser number  
**A**   

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Dealer group

**3. NEW ADVISER DETAILS**

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Dealer group

Is the investor being transferred a:  
 BT Retail investor?  
 Please provide your Retail Adviser number  
**A**   

AFSL Number/ASIC Authorised Representative Number

Continued on page 2 ▶▶



01-04-005-03

#### 4. SIGNATURES

Signature of **Investor A**

Date (dd/mm/yy)

Signatory's name *(please print)*

Signature of **Investor B**

Date (dd/mm/yy)

Signatory's name *(please print)*

Signature of **new Adviser**

Date (dd/mm/yy)

**You can submit this form by:**



mail

BT

GPO Box 2675

Sydney NSW 2001