



Dealer Group Registration and Change of Details

BT Customer Relations © 132 135 (8:30am–5:30pm Mon–Fri, Sydney time)

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

Use this form to set up a new dealer group for BT Retail Investment products, or change the details of an existing dealer group.

Please take the following action based on the information provided

- Register a new dealer group (Complete all sections)
 Change the details of an existing dealer group (Relevant sections to your change)

BT Adviser number

A

1. NEW DEALER GROUP DETAILS

Dealer Group name

Please provide the adviser's AFSL Number/ASIC Authorised Representative Number and attach a copy of AFSL.

2. NEW DEALER CONTACT DETAILS

Office address

State
Postcode

Postal address (if different from above)

State
Postcode

Daytime phone number

 ()

Mobile phone number

Fax number

 ()

Email address

3. BANK ACCOUNT FOR FEE PAYMENTS

Fees will be paid into the following account

Name of financial institution

Branch name

BSB number

Account number

Account holder's name

4. TAXATION DETAILS

Please provide the Australian Business Number (ABN) of the Licensee. Fees cannot be paid if an ABN is not supplied.

Australian Business Number (ABN)

5. INVESTOR TRANSFER

If investors are to be transferred to the new dealer group please provide the existing adviser code and name, and complete a Bulk Investor Transfer form or Single Investor Transfer form available from bt.com.au

Previous adviser name

Previous BT adviser number

A

6. ADVISER SIGNATURE

This section needs to be signed by an Authorised Signatory of the new Dealer Group.

Signature of Adviser

Date (dd/mm/yy)

 / /

Signatory's name (please print)

Adviser stamp (please use black ink only)

You can submit this form by:

mail BT
GPO Box 2675
Sydney NSW 2001



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