BT Margin Lending
Separately Managed Accounts (SMA) — Contact Details Amendments

Use this form to add or amend the contact details for a borrower or guarantor to your BT margin loan and/or your SMA account.

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

QUESTIONS?

If you are a direct investor:
- call BT Customer Relations Consultants on 1800 816 222, or
- email us at client.marginlending@btfinancialgroup.com.

If you are a financial planner:
- call BT Adviser Relations on 1800 671 409
- email us at adviser.marginlending@btfinancialgroup.com.

Phone lines are available Monday to Friday, from 8.00am to 6.30pm (Sydney time).

1. BORROWER'S DETAILS

Borrower's name(s)

Borrower's BT Margin Lending Client Code

–

Borrower's SMA account number

S M A

2. AMEND NAME OF BORROWER OR GUARANTOR

I wish to amend:

☐ Both SMA account and BT Margin Loan

☐ BT Margin Loan only

☐ SMA account only

INDIVIDUAL CHANGE OF NAME

Current name of individual borrower or guarantor (please indicate which name will change)

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Given name(s)

Surname

Individual Borrower ☐ Individual Guarantor ☐

Name details to change

Please attach an original certified copy of marriage certificate or appropriate documentation indicating change of name by deed poll.

New title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

New given name(s)

New surname

Old signature

Date (dd/mm/yy) / /

New signature

Date (dd/mm/yy) / /

COMPANY CHANGE OF NAME

Current name of Company or Corporate trustee borrower's name to change

Name details to change

Please provide your new company name and attach an original certified copy of Certificate of Change of Name (issued by ASIC).

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3. CHANGE OF MAILING ADDRESS AND CONTACT DETAILS

The address details being updated relate to:
(Please mark with an [✘] and complete name of party selected)

☐ Individual borrower or individual trustee borrower

☐ Guarantor

☐ Company borrower or Corporate trustee borrower

Name

BT Margin Lending requires you to provide your Australian residential address. This should not be a PO Box, your financial planner's or broker's address.

New residential address/registered office address

State *Postcode*

New mailing address (if you provide a mailing address it will be used for all future correspondence, including for CHESS purposes)

State *Postcode*

Please ensure you include the area code.

New daytime contact number ( )

New fax number ( )

4. CHANGE SMA EMAIL ADDRESS

When you update your email address on your SMA, this will also update your SMA account logon. You will receive a new User ID and password by email once your email address has been amended.

I wish to amend:

☐ Both SMA account and BT Margin Loan

☐ BT Margin Loan only

☐ SMA account only

New email address

5. SIGNING SECTION

Borrower/s is/are required to sign when any of the contact details changed relate to the borrower/s.

Guarantor/s is/are required to sign when the contact details changed relate to the guarantor. The borrower/s is not required to sign in this instance.

For Company or Company Trustee either two Directors, or one Director and the Secretary or the Sole Director and Secretary must sign. Please indicate your company capacity by marking the appropriate box below your signature. By signing this form you authorise BT Margin Lending to make the above changes to your BT margin loan and/or notify them to the responsible entity of the SMA.

A WITNESS MUST COMPLETE THE SIGNING SECTION IN ALL INSTANCES.

Signature of **Borrower**

Date (dd/mm/yy) / /

Signatory's full name *(please print)*

Director ☐ Sole Director/Sole Secretary ☐

Signature of **Additional Borrower**

Date (dd/mm/yy) / /

Signatory's full name *(please print)*

Director ☐ Company Secretary ☐

Signature of **Guarantor 1**

Date (dd/mm/yy) / /

Guarantor's full name *(please print)*

Signature of **Guarantor 2**

Date (dd/mm/yy) / /

Guarantor's full name *(please print)*

Signature of **Witness** *(Witness must be an independent party to this application). Please ensure a witness completes this form in all instances.*

Date (dd/mm/yy) / /

Witness' full name *(please print)*

You can submit the original of this form by:

mail BT Margin Lending
GPO Box 3917, Sydney NSW 2001

This form cannot be faxed or emailed