



BT Investment Funds BT Investor Choice Funds BT Classic Investment Funds Change of Details

BT Contact Centre ☎ 132 135 (8.00am–6.30pm Mon–Fri Sydney time)

The Responsible Entities for the Funds offered through BT Investment Funds are BT Funds Management Limited ABN 63 002 916 458, AFSL 233724, BT Funds Management No. 2 Limited ABN 22 000 727 659, AFSL 233720 and Westpac Financial Services Limited ABN 20 000 241 127, AFSL 233716.

The Responsible Entity for the Funds offered through BT Investor Choice Funds is Westpac Financial Services Limited ABN 20 000 247 127, AFSL 233716.

The Responsible Entities for the Funds offered through BT Classic Investment Funds are BT Funds Management Limited ABN 63 002 916 458, AFSL 233724 and BT Funds Management No. 2 Limited ABN 22 000 727 659, AFSL 233720.

- The information collected on this form is governed by the BT Privacy Policy which is available on www.bt.com.au.
- Use this form to change contact details, name or bank account details.

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

1. INVESTOR DETAILS

Investor number

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INVESTOR A – INDIVIDUALS, JOINT INVESTORS OR TRUSTEES

Title

Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="checkbox"/>	
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Given name(s)

Surname

Daytime phone number Mobile phone number

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Check this box to receive an SMS confirmation once your change of details has been processed.*

INVESTOR B – JOINT INVESTORS OR TRUSTEES

Title

Mr <input type="checkbox"/>	Mrs <input type="checkbox"/>	Miss <input type="checkbox"/>	Ms <input type="checkbox"/>	Other <input type="checkbox"/>	
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Given name(s)

Surname

Daytime phone number Mobile phone number

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COMPANIES, ASSOCIATIONS OR OTHER INVESTORS

Full company name, association or other investor

ACCOUNT REFERENCE

Where account is held on behalf of others

2. NEW CONTACT DETAILS

Complete this section to change contact details.
This change will be applied to all investments under this BT Investor number.

New mailing address

State	Postcode
Country, if not Australia	

Daytime phone number Mobile phone number

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Check this box to receive an SMS confirmation once your change of details has been processed.*

Email address**

* BT provides this service free of charge. An SMS confirmation message will only be sent to an Australian mobile number. In the future, BT may choose to send you an SMS confirmation for other transactions as and when they occur. For full terms of service, please go to bt.com.au
** In the future, BT may elect to email correspondence to you

3. CHANGE OF NAME

Complete this section for change of name

Title

Mr Mrs Miss Ms Other

New given name(s)

New surname

Old signature

Date (dd/mm/yy)

New signature

Date (dd/mm/yy)

In order to change your name on our records, we require, at a minimum an original certified copy of one of the documents in 'Section A' and one from 'Section B'. Original documents can be verified at any Westpac Branch by a Staff member:

Section	A new name adopted by Marriage	A Former name	A New name
A	<ul style="list-style-type: none">• Marriage Certificate	<ul style="list-style-type: none">• Birth Certificate• Change of Name Certificate• Decree Nisi if Divorce is not yet finalised• Divorce Certificate	<ul style="list-style-type: none">• Change of Name Certificate
B	<ul style="list-style-type: none">• Drivers Licence• State or Territory Proof of Age Card• Passport		

4. NEW ACCOUNT SIGNING AUTHORITY

Joint (non corporate) investors only — complete this section to change the account signing authority for future transactions and cheques. Note: if no option is nominated, future transactions will require both investors to sign.

- Either Investor A or B
 Investor A only
 Investor B only

5. NEW DISTRIBUTION OPTION

Complete this section to change your distribution option. This will apply to all Funds unless special instructions are supplied in an attached signed schedule.

- Reinvest (not available for the APN Property for Income Fund)
 Pay to bank account in Section 6
 Pay to BT Cash Management Trust (you must be a BT Cash Management Trust investor, part of the BT Investment Funds range)
 Post a cheque (overseas investors only)

6. NEW BANK ACCOUNT DETAILS

Complete this section to change your bank account details. Note: Bank accounts must be in the name(s) of the investor(s).

Name of Australian financial institution

Branch name

BSB number

Account number

Account holder's name(s)

Please apply these bank account details for:

- Distributions and/or Flex Payment Plan payments
 Withdrawals
 Direct debits including the Regular Investment Plan. Ensure all bank account signatories sign below.

DIRECT DEBIT AUTHORITY

By signing this Direct Debit Request, I/we:

- authorise Westpac Financial Services Limited ABN 20 000 241 127 (User ID 012419) to, until further notice, arrange for funds to be debited from my/our account at the financial institution identified above through the Bulk Electronic Clearing System
- acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Service Agreement on the following page.

Where the investor is not the nominated bank account holder:

- I/We consent to the investor(s) increasing amounts or making additional investments without further approval from me/us.

If you do not agree with this declaration, please [X] this box

In the case of company signatories, two directors, or a director and a company secretary, must sign unless a sole director and sole secretary.

Signature of **Account holder A or company officer**

Date (dd/mm/yy)

Signatory's full name (*please print*)

Director Sole Director and Sole Secretary

Signature of **Account holder B or company officer**

Date (dd/mm/yy)

Signatory's full name (*please print*)

Director Company Secretary

7. TAX FILE NUMBER, AUSTRALIAN BUSINESS NUMBER

Collection of Tax File Number (TFN) information is authorised and its use and disclosure are strictly regulated by tax laws and the Privacy Act. Investors must only provide an Australian Business Number (ABN) instead of a TFN when the investment is made in the furtherance of an enterprise.

You are not obliged to provide either your TFN or ABN, but if you do not provide either, or claim an exemption, we are required to deduct tax from your distribution at the highest marginal rate (plus Medicare Levy) to meet Australian Tax Office requirements.

TFN of **Investor A**

TFN of **Investor B**

ABN

Or reason for exemption

Non-resident* Charity Other

* *Non-residents please specify country of residence*

8. DECLARATION AND INVESTORS SIGNATURE

**ALL INVESTORS MUST SIGN
AND DATE THIS FORM**



I/we declare that all the details given in this form are true and correct. If signing under a power of attorney, you verify that, at the time of signing, you have not received notice of revocation of that power. Please provide an originally certified copy of the power of attorney including the appointed power of attorney's signature, if not already provided to us.

Joint applicants must all sign unless we have received prior instructions from all investors that any can sign solely.

In the case of company signatories, two directors, or a director and a company secretary, must sign unless a sole director and sole secretary.

Signature of **Investor A or company officer**

Date (dd/mm/yy)

Signatory's full name *(please print)*

Director Sole Director and Sole Secretary

Signature of **Investor B or company officer**

Date (dd/mm/yy)

Signatory's full name *(please print)*

Director Company Secretary

9. ADVISER USE ONLY

BT Adviser number

Work phone number

Mobile phone number

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Signature of adviser

Date (dd/mm/yy)

10. DIRECT DEBIT REQUEST SERVICE AGREEMENT

By completing the Direct Debit Request that forms part of the application form, you will be providing us with the ability to debit your nominated account and transfer the amount you request to your investment. This agreement sets out the terms on which you authorise us to deduct from your account with your financial institution any amounts that become payable to an investment with us.

Direct Debit arrangements

- for initial applications made by completing a Direct Debit Request, we will debit the amount(s) nominated from your account generally within two days of receiving a valid application
- for subsequent investments, when we receive a valid instruction either by phone, letter or over the internet, we will debit your account generally within two days of receiving the instructions (provided we have previously received a valid Direct Debit Request)
- a valid instruction will be an instruction given by you or from a person nominated by you to provide such instructions.

Regular Investment Plan arrangements

- for investments made under a Regular Investment Plan, we will debit your account on or around the date you have chosen — either the 5th or the 19th of each month
- where the due date falls on a non-business day, we will draw the amount on the next business day. If you are uncertain as to when the debit will be processed to your nominated account, you should enquire directly with your financial institution where the account is based.

Your Responsibilities

It is your responsibility to:

- ensure that your financial institution allow direct debits on your nominated account.
- ensure that your nominated account details are correct, and if uncertain, to check with your financial institution before completing the Direct Debit Request
- ensure that sufficient cleared funds are available in your nominated account by the due date to permit payments under the Direct Debit Request. Please check with us if you are uncertain when debits will be processed to your account
- ensure that the authorisation given to draw on your nominated account is identical to the account signing instruction held by your financial institution where the nominated account is based
- advise us if your nominated account is transferred or closed or your nominated account details change
- arrange with us a suitable alternate payment method if the drawing arrangements are cancelled either by you or your financial institution.

Your rights

- you may cancel, alter, defer or suspend your Direct Debit Request, or stop or suspend an individual debit from taking place, by calling BT Customer Relations on 132 135, from 8.00am to 6.30pm (Sydney time), Monday to Friday. In some cases we will require your written confirmation.
- you must notify us at least seven business days before the next scheduled debit to ensure changes are effective that month. Notification received after that time may result in your changes taking effect in the following month. You may also be able to stop an individual debit by contacting your own financial institution. You may be liable for financial institution charges if you do this; the financial institution should have information on these.
- if you have any questions or concerns about your Direct Debit Request, such as where you consider that a drawing has been initiated incorrectly, you should take the matter up directly with us by calling BT Customer Relations on 132 135, from 8.00am to 6.30pm (Sydney time), Monday to Friday.

Our commitment to you

- we will only change the amount of the payment under the Direct Debit Request on receipt of a valid instruction
- we will only vary the terms of this agreement after giving you 30 days notice in writing
- we reserve the right to cancel your drawing arrangements if two or more consecutive drawings are returned unpaid by your nominated financial institution. Standard government fees, duties and bank charges (including dishonour fees and conversion costs) may apply to investments. These are paid by the investor.
- we will keep all your records and information pertaining to your nominated account at the financial institution private and confidential, except where you have made a claim relating to a debit you claim has been made incorrectly, or wrongfully, in which case Westpac Banking Corporation ABN 33 007 457 141 (as our sponsor in the Bulk Electronic Clearing System) may require us to provide this information to them in connection with your claim to the extent necessary to resolve your claim.

You can submit this form by:

- ✉ mail BT Financial Group
GPO Box 2675
Sydney NSW 2001
- ☎ fax visit a Westpac Branch and request that this form is faxed to us at our fax number (02) 9274 5780
- ✉ email* retailprocessing@btfinancialgroup.com

* We will not accept any requests by email if you are changing your name.