



### Issue date 13 October 2023

The Responsible Entities for the Funds offered through BT Investment Funds are 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.

**Financial advisers:** if you are the investor’s financial adviser and have been appointed as the authorised representative for this investment, you can complete this form on behalf of the investor. If Section 8 ‘Payment/Distribution Account Details’ is completed, this form must also be signed by the investor. Please ensure you also complete Section 10 ‘Adviser Use Only’.

- The information collected on this form is governed by the BT Privacy Policy which is available online at [bt.com.au](https://bt.com.au).

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

## 1. INVESTOR DETAILS

Investor number

C \_\_\_\_\_

### INVESTOR A – INDIVIDUALS, JOINT INVESTORS OR TRUSTEES

Title

Mr  Mrs  Miss  Ms  Other \_\_\_\_\_

Given name(s)

\_\_\_\_\_

Surname

\_\_\_\_\_

Daytime phone number

( ) \_\_\_\_\_

Mobile phone number

\_\_\_\_\_

Check this box to receive an SMS confirmation once your additional investment request has been processed.\*

Email address\*\*

\_\_\_\_\_

### INVESTOR B – JOINT INVESTORS OR TRUSTEES

Title

Mr  Mrs  Miss  Ms  Other \_\_\_\_\_

Given name(s)

\_\_\_\_\_

Surname

\_\_\_\_\_

Daytime phone number

( ) \_\_\_\_\_

Mobile phone number

\_\_\_\_\_

Check this box to receive an SMS confirmation once your additional investment request has been processed.\*

Email address\*\*

\_\_\_\_\_

### COMPANIES, ASSOCIATIONS OR OTHER INVESTORS

Full name of company, association or other investor

\_\_\_\_\_  
\_\_\_\_\_

Mobile phone number

\_\_\_\_\_

Check this box to receive an SMS confirmation once your additional investment request has been processed.\*

### ACCOUNT REFERENCE

Provide an account reference where account is held on behalf of others – name of partnership, trust or superannuation fund, child, estate, club/association

\_\_\_\_\_  
\_\_\_\_\_

\* *BT provides this service free of charge. An SMS confirmation message will only be sent to an Australian mobile number. Please specify either Investor A, Investor B or Company/Association to receive the SMS confirmation – multiple messages cannot be sent. 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](https://bt.com.au).*

\*\* *In the future, BT may elect to email correspondence to you.*

### 2. THIS INVESTMENT

**How will your additional (one-off) investment be made?**

Note: Cash is not accepted

Cross [X] the relevant box.

<input type="checkbox"/> Cheque	<input checked="" type="checkbox"/> Make cheques payable to: 'BT – BIF – <investor name>' (endorsed cheques not accepted)
<input type="checkbox"/> Direct Debit	<input checked="" type="checkbox"/> Make sure you also complete Direct Debit Request account details in Section 4.

### 3. BORROWED MONIES FOR INVESTMENT

You cannot set up a percentage based advice fee on your BT account if it contains any borrowed money.

Does your BT account or this additional investment consist of any amount that you have borrowed to invest (either now or previously?)

No

**Important:** If you do not complete this section, we will assume your BT account contains borrowed money and we may cancel any percentage based advice fees for your BT account.

#### 4. DIRECT DEBIT REQUEST ACCOUNT DETAILS

Account holder(s) must complete this section if you want us to debit an account with your financial institution.

**!** Only Australian bank account details will be accepted.

Name of financial institution

Branch name

BSB number

Account number

Account name

  


#### ALL BANK ACCOUNT SIGNATORIES MUST SIGN AND DATE BELOW

##### Direct Debit Authority

By signing this Direct Debit Request, I/we:

- authorise BT Funds Management No. 2 Limited ABN 22 000 727 659 (User ID 021567) and 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 institution identified above through the Bulk Electronic Clearing System
- acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Request Service Agreement at the end of this form.

##### 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 corporate signatories, two directors or a director and a company secretary must sign unless you are a sole director and sole secretary.**

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

Date (dd/mm/yy)

 /  / 

Signatory's full name (please print)

Director  Sole Director and Sole Company Secretary

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

Date (dd/mm/yy)

 /  / 

Signatory's full name (please print)

Director  Company Secretary

**!** Please ensure Section 9 'Declaration and Investor Signature' is also completed.

#### 5. PRODUCT SUITABILITY QUESTIONS

The following questions are asked for the purpose of determining whether you are in the target market described in the Target Market Determination (TMD) prepared for the Investment Option(s) you wish to invest into. The TMDs for each Investment Option are available on our website at [www.bt.com.au/tmd](http://www.bt.com.au/tmd).

We will not be able to process your application until you have answered all the questions below.

##### 1. Have you received personal financial advice from a licensed financial adviser in relation to your intended investment in the Investment Option(s)? (select one)

- Yes  Please proceed to the Investment Details section below  
 No

##### 2. What is/are your investment objective(s)?

If you intend to invest in multiple Investment Options to build an investment portfolio, you may choose more than one investment objective.

- Capital growth  
 Capital preservation  
 Income distribution

##### 3. When intending to invest into the Investment Option(s), what is your intended use of each Investment Option in your investment portfolio? (select only one option for each Investment Option below).

Funds	APIR	Intended product use (% of investable assets*)
<b>Very Low Risk</b>		
BT Cash Management Trust	BTA0002AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
<b>High Risk</b>		
BT Australian Share Fund	BTA0021AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT Future Goals Fund	BTA0044AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT Imputation Fund	RFA0019AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT Property Securities Fund	BTA0051AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)

Funds	APIR	Intended product use (% of investable assets*)
Platinum International	WFS0092AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
<b>Very High Risk</b>		
BT American Share Fund	BTA0023AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT Asian Share Fund	BTA0026AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT European Share Fund	BTA0025AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT International Fund	BTA0024AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT Smaller Companies Fund	RFA0012AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)
BT Technology Fund	BTA0127AU	<input type="checkbox"/> Solution/Standalone (up to 100%) <input type="checkbox"/> Major allocation (up to 75%) <input type="checkbox"/> Core component (up to 50%) <input type="checkbox"/> Minor allocation (up to 25%) <input type="checkbox"/> Satellite allocation (up to 10%)

\* Investable assets is the total assets that the investor has available for investment purposes, including assets already invested, excluding the residential home.

**4. What is your intended investment timeframe in the Investment Option(s)? (select one)**

- Less than 2 years
- 2 to 8 years
- Greater than 8 years

**5. What is your tolerance for risk (your ability to bear loss) and return profile? (select one)**

- Low
- Medium
- High
- Very high

**6. What do you anticipate your need to access capital may be? (select one)**

- Within 1 week of request
- Within 1 month of request
- Within 1 year of request
- 1 year or longer

## 6. INVESTMENT DETAILS

Enter the amount to be invested in each investment option			Regular Investment Plan	Distribution options		
<i>There is no minimum amount for additional investments into an existing holding or if starting a new Fund. A Contribution fee may apply.</i>			<i>Complete if you wish to start a Regular Investment Plan.</i>	<i>Select a distribution option – cross [X].<sup>1</sup> If you do not select a distribution option and have not set up a Flexi Payment Plan, your distributions will be reinvested.</i>		
Investment options	Adviser use only	Specify amount below for the additional investment	Specify amount for your Regular Investment Plan and also complete Section 7	Reinvest	Pay to bank and also complete Section 8	Pay to BT Cash Management Trust <sup>2</sup>
<b>Diversified</b>						
BT Future Goals Fund	BTA0044AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>International Shares</b>						
BT International Fund	BTA0024AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT American Share Fund	BTA0023AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Asian Share Fund	BTA0026AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT European Share Fund	BTA0025AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Technology Fund	BTA0127AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platinum International	WFS0092AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Australian Shares</b>						
BT Australian Share Fund	BTA0021AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Imputation Fund	RFA0019AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Smaller Companies Fund	RFA0012AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Property</b>						
BT Property Securities Fund	BTA0051AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Cash</b>						
BT Cash Management Trust	BTA0002AU	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTAL</b>		<b>\$</b>	<b>\$</b>			

<sup>1</sup> BT must be notified of a change in distribution option at least seven days before the scheduled distribution for it to be effective that period.

<sup>2</sup> You must be a BT Cash Management Trust investor to have your distributions from other funds paid into the BT Cash Management Trust.

## 7. REGULAR INVESTMENT PLAN DETAILS

### How is your Regular Investment Plan monthly investment to be made?

Cross [X] the relevant box.

<input type="checkbox"/> Direct Debit	➤ Make sure you also complete Section 4.
<input type="checkbox"/> Payroll deduction	➤ Make sure you also complete the separate Payroll Deduction Authority form.

## 8. PAYMENT/DISTRIBUTION ACCOUNT DETAILS

Complete this section if distributions, withdrawals or Flexi Payment Plan payments are to be paid to an Australian bank account in the name of the BT investment.

Write 'as above' if same as direct debit account.

**! Only Australian financial institution account details will be accepted.**

Name of financial institution

Branch name

BSB number

Account number

Account name

## 9. DECLARATION AND INVESTORS' SIGNATURE

In signing this Additional and Regular Investments Request form, I/we:

- acknowledge that I/we have read and understood a copy of the current BT Investment Funds Product Disclosure Statement (PDS) and I/we agree to be bound by the PDS and the relevant constitution(s), each as amended from time to time.
- declare that all the details given in this application are true and correct.

**YOUR REQUEST CANNOT PROCEED  
IF THIS SECTION IS NOT SIGNED**

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

If signing under Power of Attorney (POA), 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 POA including the appointed POA signature, if not already provided to us.

If the POA's signature is not included, please attach two originally certified copies of identification.

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

Signature of **Investor A** or **company officer A**

Date (dd/mm/yy)

Signatory name (*please print*)

Director  Sole Director and Sole Secretary

Signature of **Investor B** or **company officer B**

Date (dd/mm/yy)

Signatory name (*please print*)

Director  Sole Director and Sole Company Secretary

## DIRECT DEBIT REQUEST SERVICE AGREEMENT

By completing the Direct Debit Request that forms part of this Form, you will be providing BT Funds Management No.2 Limited ABN 22 000 727 659 and Westpac Financial Services Limited ABN 20 000 241 127 (each a 'Responsible Entity') (each Responsible Entity is part of the BT Financial Group and is referred to in this agreement as 'we', 'our' or '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 Business 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 Business 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 allows 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
- 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 8.30am to 5.30pm (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 132 135. We're constantly striving to provide the best possible service, and we'll do our best to resolve any concern you have efficiently and fairly. Our aim is to resolve your complaint within 5 business days, and where possible we will resolve your complaint on the spot. If we need some additional time to get back to you, we will let you know. Should we be unable to resolve your concern at your first point of contact, we will then refer the complaint to our dedicated Customer Managers in our Customer Solutions Team. If you are not satisfied with our response or handling of your complaint, you can contact the external dispute resolution scheme, the Australian Financial Complaints Authority (AFCA) by calling 1800 931 678.

**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 believe 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.

Please mail your completed application form, together with any cheque(s) (if applicable) to:

✉ mail BT  
GPO Box 2675 Sydney NSW 2001

**10. ADVISER USE ONLY**

BT Adviser number

**A**

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Phone number

( )

Fax number

( )

Mobile phone number

Office postcode

Email address

Investment Link ILCN (Client No.)

ILGN Group Number

Signature of **Adviser**

Date (dd/mm/yy)

*Financial adviser stamp (please use black ink only)*