



# BT Investment Funds Switch Request

BT Customer Relations ☎ 132 135 (8.30am–5.30pm Mon–Fri, Sydney time)  
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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 are the Responsible Entities (RE) of BT Investment Funds.

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

**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 the bank details in 'Section 2' are completed, this form must also be signed by the investor. Please ensure you also complete Section 6 'Financial Adviser Use Only'.

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 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 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 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](http://bt.com.au).

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

## 2. DISTRIBUTION OPTION

If switching to a new Fund, please select a distribution option below. If no distribution option is nominated for the Fund switched to, distributions will automatically be reinvested. If switching to an existing Fund, previous distribution instructions will still apply.

**Note: If you have a Regular Investment Plan and you make a full switch, the plan will automatically transfer to the Fund(s) to which you are switching.**

☐ Pay to BT Cash Management Trust (you must be a current investor in the BT Cash Management Trust)

☐ Reinvest

☐ Pay to bank account on file

☐ Pay to the following Australian bank account – this must be in the same name as the BT Investment.

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

Name of financial institution

Branch name

BSB number

Account number

Account name



### 3. 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 Switching 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

**4. SWITCHING DETAILS**

There is no minimum switching amount. Please note that you can switch into any open Fund.

Please specify whether you are requesting a switch of Units OR Dollars then complete the amount. If switching your entire investment in a Fund(s), write 'full' beside the relevant Fund(s).			Switch From – Specify (X) <input type="checkbox"/> Units OR <input type="checkbox"/> Dollars	Switch To – Specify (X) <input type="checkbox"/> Units OR <input type="checkbox"/> Dollars
Diversified	BT Future Goals Fund	BTA0044AU		
International shares	BT International Fund	BTA0024AU		
	BT American Share Fund	BTA0023AU		
	BT Asian Share Fund	BTA0026AU		
	BT European Share Fund	BTA0025AU		
	BT Technology Fund	BTA0127AU		
	Platinum International	WFS0092AU		
Australian shares	BT Australian Share Fund	BTA0021AU		
	BT Imputation Fund	RFA0019AU		
	BT Smaller Companies Fund	RFA0012AU		
Property	BT Property Securities Fund	BTA0051AU		
Cash	BT Cash Management Trust	BTA0002AU		
<b>TOTAL</b>				



## 5. DECLARATION AND INVESTORS' SIGNATURE

In signing this Switching Form, I/we:

- acknowledge that I/we have read and understood the current BT Investment Funds PDS to which this Switch Request relates 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 details given in this form 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's full name (*please print*)

Director ☐ Sole Director and Sole Company Secretary ☐

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

Date (dd/mm/yy)

Signatory's full name (*please print*)

Director ☐ Company Secretary ☐

**You can submit your completed form by:**

- ✉ mail BT Financial Group  
GPO Box 2675 Sydney NSW 2001
- ✉ email [retailprocessing@btfinancialgroup.com](mailto:retailprocessing@btfinancialgroup.com)

## 6. FINANCIAL ADVISER USE ONLY

BT Adviser number

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)*

