



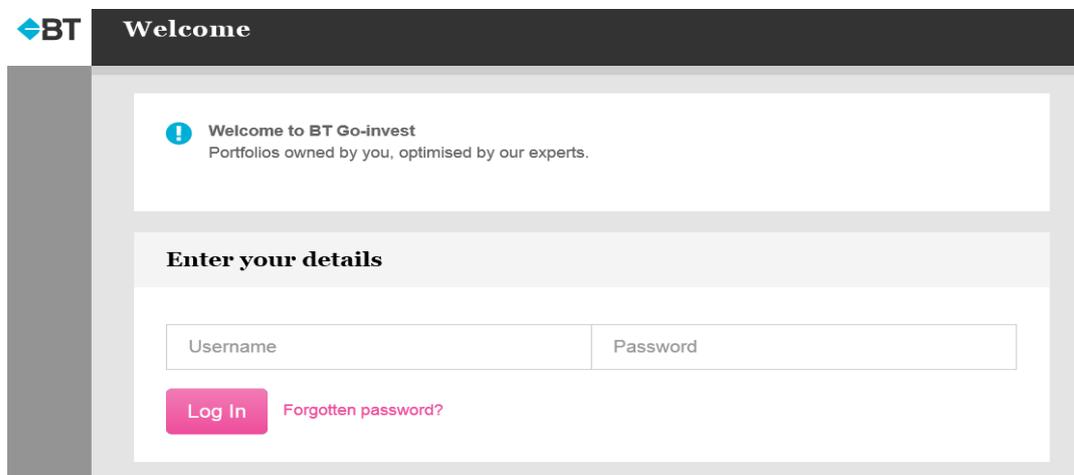
How do I?

BT Go-invest Wind up

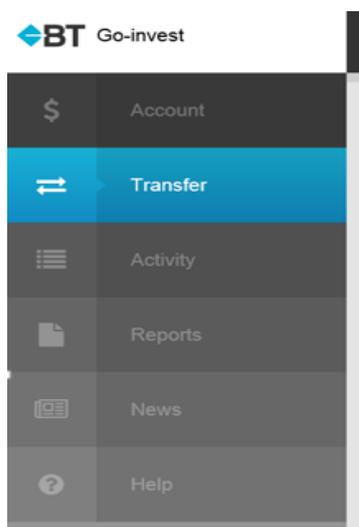
1. How do I sell down (or withdraw) my BT Go-invest Portfolio?

You can conduct full sell down (or withdraw) your BT Go-invest portfolio by logging into BT Go-invest portal and following steps listed below.

- i. Login to the secure BT Go-invest portal: managedaccounts.bt.com.au/GoInvest/
- ii. Your username will be the 8-9 digit Westpac Customer Number. If you have forgotten your password please go to Question 3 below



- iii. From your BT Go-invest homepage, navigate to and click the “Transfer” menu located on left side of the screen:



- iv. Under “Transfer type”, select the “Withdraw” option:

Request a transfer

Transfer type

| | | | | | |
|--------|-----------------------|------|-----------------------|----------|----------------------------------|
| Invest | <input type="radio"/> | Move | <input type="radio"/> | Withdraw | <input checked="" type="radio"/> |
|--------|-----------------------|------|-----------------------|----------|----------------------------------|

- v. Under “Transfer from”, select the model that you wish to sell down. Note that you need to repeat these steps if you wish to sell down multiple model portfolios:

Transfer from

JOHN SMITH (769999)

| | | | |
|--------------------------------------|----------------------------------|-------------------------------------|----------------------------------|
| Diversified Conservative (\$0.00) | Diversified Moderate (\$0.00) | Diversified Growth (\$20,236.01) | Local Growth (\$18,755.41) |
| <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input checked="" type="radio"/> |

- vi. Under “Transfer to”, check that your bank details are current and accurate. Please refer to Question 4 below if you need to update your bank details:

Transfer to

Existing Direct Credit Account
You do not have details set up

- vii. Under “Transfer amount”, specify the dollar amount that you will to sell down or alternatively click the “Withdraw entire amount from Local Growth”

Transfer amount

\$

Withdraw entire amount from Local Growth

Review

Hit the “Review” button to verify all the details are correct as instructed, then hit the “Submit” button to complete the process. We will process your instructions within two business days.

2. How do I transfer my holdings to another broker?

You will need to complete the BT Go-invest Securities Transfer Form which can be found under the “Documents and downloads” sections of the BT Go-invest website: www.bt.com.au/go-invest/

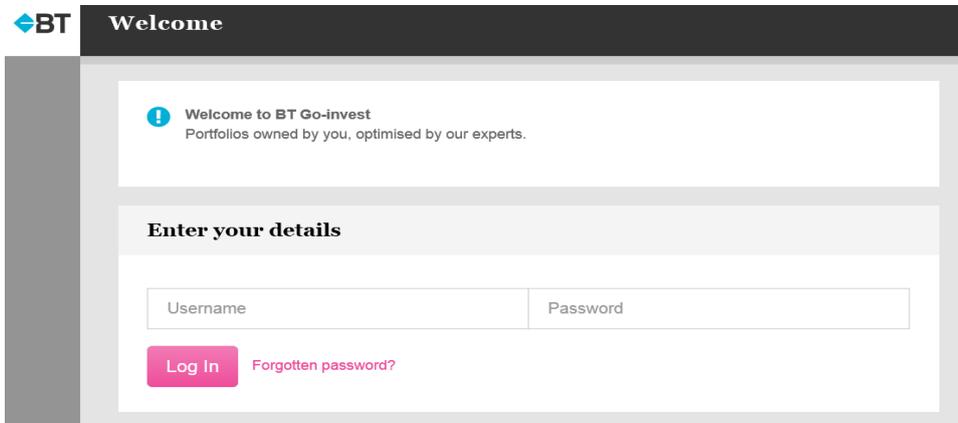
Please ensure that you complete:

- a. Broker details including Account name, Account number, Broker name, Holder Identification Number (HIN) and Participant Identification Number (PID)

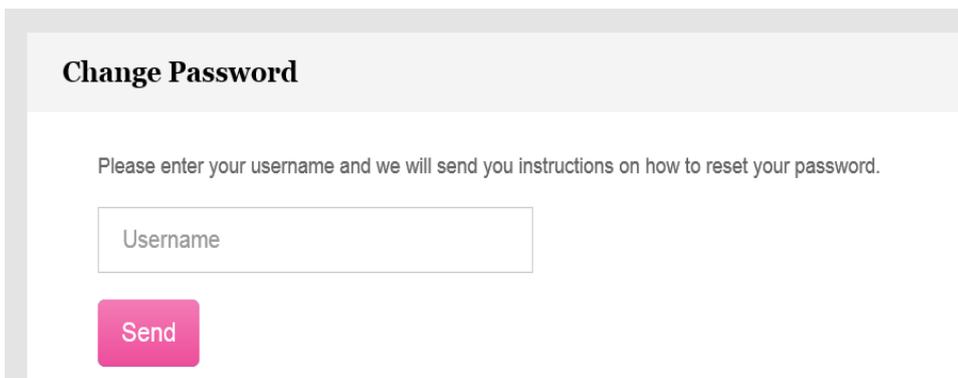
- b. A separate Securities Transfer Form for each individual security that you wish to transfer
- c. Account holder/s to sign all transfer forms

3. How do I reset my password?

Please click the “Forgotten password?” link on the BT Go-invest portal:



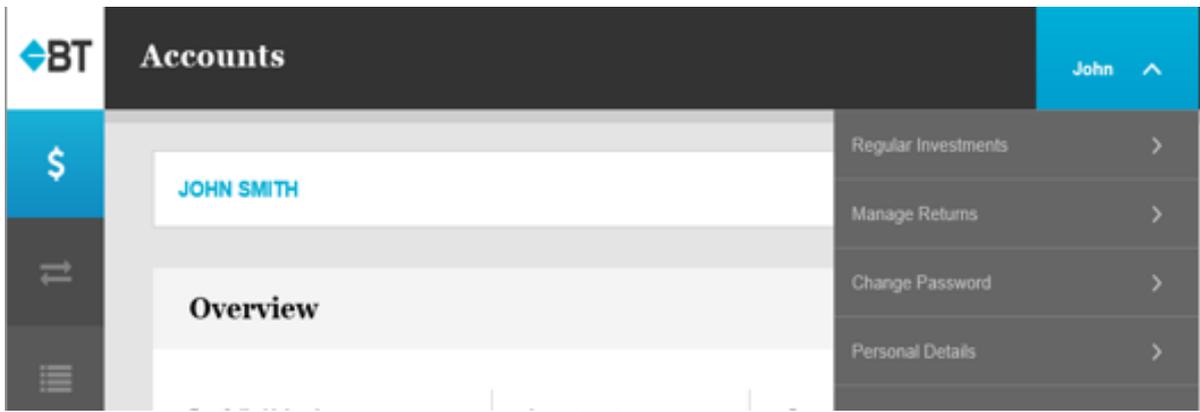
Then submit your username when prompted to receive instructions on how to reset your password:



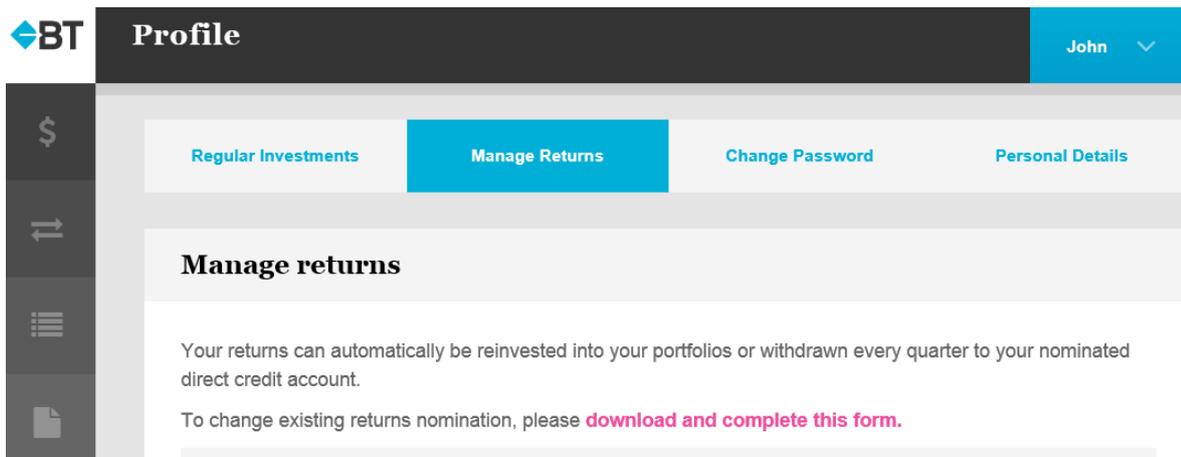
4. How do I update my bank account details?

You will need to complete a “Manage Returns” form to update your bank details. Please follow the steps outlined below:

- i. Login to the secure BT Go-invest portal: managedaccounts.bt.com.au/GoInvest/
- ii. Navigate to and click the name icon located in the top right hand corner of the BT Go-invest homepage (“John” in the below screenshot), then click “Manage Returns” from the drop down menu:



iii. Download the “Manage Returns” form by clicking “download and complete this form”:



iv. Complete the form, sign and email to support@btgoinvest.com.au.