



Westpac branch stamp

Please use this Form if any of the following apply to you:

1. you wish to transfer securities into your BT Go-invest Portfolio from an existing Broker account
2. you wish to make a withdrawal and transfer securities out of your BT Go-invest Portfolio to your existing broker account.

If the Form is incomplete, your investment requests may not be processed. If you require help completing this Form, please call 1300 887 769. You will need to complete a separate Securities Transfer Form for each individual security parcel, even if they are with the same broker.

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

FEES AND CHARGES

There are no fees or charges incurred for transferring securities into your BT Go-invest Portfolio. Transferring securities out of your BT Go-invest Portfolio incurs a cost of \$27.50 per individual holding withdrawn.

1. DETAILS OF YOUR BROKER

Please complete the Broker details you are transferring from or to.

Broking account name

Broking account number

Broker's name

Broker's PID

Broker's address

State Postcode

Country, if not Australia

2. TRANSFER DETAILS

Full name of the company or corporation in which securities are held e.g. Westpac Banking Corporation.

DESCRIPTION OF SECURITIES (SHARES, ETC.)

For example Fully Paid Ordinary Shares, 9% Unsecured Convertible Notes etc.

Class

If not fully paid, pay to

NUMBER OF SECURITIES BEING TRANSFERRED

Words

Figures \$

PORTFOLIO NAME

The Model Portfolio name you wish to transfer securities into or out of i.e. Local Growth – please cross

- Local Growth Diversified Moderate
 Diversified Growth Diversified Conservative

3. DETAILS OF TRANSFEROR/S (SELLER/S)

If you are transferring securities **into** your BT Go-invest Portfolio please complete. If you are transferring securities out of your BT Go-invest Portfolio please leave blank and go to section 4.

Title

Mr Mrs Miss Ms Other

Full name (must be the same as the name in which your BT Go-invest Portfolio is held)

Full postal address

State Postcode

Country, if not Australia

Holder Identification Number (HIN) (if applicable) – this number can be found on the Issuer Holding Statement or a CHESS Holding Statement.

Insert the original full amount paid in settlement of the security parcel.

Cost at purchase A\$

Insert the original date of purchase of the security parcel



4. DETAILS OF THE TRANSFEREE/S (BUYER/S)

If you are transferring securities **out of** your BT Go-invest Portfolio please complete. If you are transferring securities into your BT Go-invest Portfolio please leave blank and go to section 5.

Title

Mr Mrs Miss Ms Other

Full name

Full postal address

<input type="text"/>	
<input type="text"/>	
<small>State</small>	<small>Postcode</small>
Country, if not Australia	<input type="text"/>

Holder Identification Number (HIN) (if applicable) – *this number can be found on the Issuer Holding Statement or a CHESS Holding Statement.*

5. ACKNOWLEDGMENTS, PRIVACY, TERMS AND CONDITIONS

I/We the registered holder(s) and undersigned seller(s) for the above consideration do hereby transfer to the above name(s) hereinafter called the Buyer(s) the securities as specified above standing in my/our name(s) in the books of the issuer of the above named Security, subject to the several conditions on which I/we held the same at the time of signing hereof and I/we the Buyer(s) do hereby agree to accept the said securities subject to the same conditions.

I/We acknowledge that, where securities are being transferred out of my/our portfolio, if there is insufficient cash in the portfolio, securities may be sold from the portfolio in order to satisfy any outstanding amount(s) owing, such as brokerage and management fees.

TRANSFEROR/S (SELLER/S)

Please complete if you are transferring securities into BT Go-invest, otherwise leave blank.

- i. Individuals – the securityholder must sign
- ii. Joint Holdings – where the holding is in more than one name, all of the securityholders must sign
- iii. Companies – Director, Company Secretary, Sole Director and Sole Company Secretary can sign.

Please indicate the office held under your signature.

Signature of **Individual or Securityholder 1**

Date (dd/mm/yy)

Director Sole Director Sole Company Secretary

Signature of **Securityholder 2**

Date (dd/mm/yy)

Director Company Secretary

TRANSFEREE/S (BUYER/S)

Please complete if you are transferring securities out of your BT Go-invest Portfolio, otherwise leave blank

- i. Individuals – the securityholder must sign
- ii. Joint Holdings – where the holding is in more than one name, all of the securityholders must sign
- iii. Companies – Director, Company Secretary, Sole Director and Sole Company Secretary can sign.

Please indicate the office held under your signature.

Signature of **Individual or Securityholder 1**

Date (dd/mm/yy)

Director Sole Director Sole Company Secretary

Signature of **Securityholder 2**

Date (dd/mm/yy)

Director Company Secretary

SENDING US YOUR FORM

To fast track the transfer process, you can email a scanned copy of the signed Form to support@btgoinvest.com.au. Please note the transfer cannot be finalised until the original signed Securities Transfer Form is received.

Send your signed original Securities Transfer Form to: BT Go-invest Client Services
GPO Box 5330
Sydney NSW 2001



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