

- Use this form to transfer a single investor between BT Retail and/ or Margin Lending advisers.
- If you have a question relating to changing the details of a Retail adviser, please call BT Adviser Line on 1800 025 127. If your question relates to changing the details of a Margin Lending adviser, please call BT Margin Lending Customer Relations on 1800 671 409.

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

## 1. INVESTOR DETAILS

Investor number

### Investor A – Individuals, Joint Investors or Trustees

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Daytime phone number ( )  Mobile phone number

### Investor B – Joint Investors or Trustees

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Daytime phone number ( )  Mobile phone number

### Companies, Associations or Other Investors

Full name of company, association or other investor

### Account reference

Provide your account reference (where account is held on behalf of others)

Email address\*

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

## 2. PREVIOUS ADVISER DETAILS

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

## 3. NEW ADVISER DETAILS

Title  
 Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Dealer group

Is the investor being transferred a:

- BT Retail investor?  
 Please provide your Retail Adviser number  
 A
- BT Margin Lending investor?  
 Please provide your Margin Lending Adviser number

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01-04-005-02

#### 4. SIGNATURES

Signature of **Investor A**

Date (dd/mm/yy)

Signatory's name *(please print)*

Signature of **Investor B**

Date (dd/mm/yy)

Signatory's name *(please print)*


Signature of **Adviser**

Date (dd/mm/yy)

**You can submit this form by:**


**Retail**

 mail BT Financial Group  
GPO Box 2675  
Sydney NSW 2001

 fax (02) 9274 5670

**Margin Lending**

 mail BT Margin Lending  
GPO Box 3917  
Sydney NSW 2001

 fax (02) 9274 5782