



Single Investor Transfer

BT Adviser Services ☎ 1800 025 127 (8.00am – 6.30pm Mon – Fri Sydney time)

BT Margin Lending Contact Centre ☎ 1800 671 409 (8.00am - 6.30pm Mon – Fri Sydney time)

Use this form to transfer a single investor between BT Retail and/or Margin Lending advisers.

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

1. INVESTOR DETAILS

Investor number (mandatory)

Investor A – Individuals, Joint Investors or Trustees

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Daytime phone number

Mobile phone number

Investor B – Joint Investors or Trustees

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

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)

2. PREVIOUS ADVISER DETAILS

BT Adviser number

A

Margin Lending Adviser number

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Dealer group

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

AFSL Number/ASIC Authorised Representative Number

Continued on page 2 ▶▶



01-04-005-03

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 **new Adviser**

Date (dd/mm/yy)

You can submit this form by:


Retail

 mail BT
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