



Westpac Securities Administration Limited ABN 77 000 049 472 AFSL 233731 RSE L0001083 is the trustee of BT Business Super RSE R1003970 ABN 81 236 903 448

Use this form if you wish to:

- To have a Member Advice fee deducted from your account.
- Amend an existing Member Advice fee arrangement

Note: A Member Advice fee can be deducted as:

- A once off up-front fee payable to your financial planner, or
- An ongoing fee payable to your financial planner on a monthly basis.

The personal advice provided must be in respect of your benefits in BT Business Super account.

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

1. MEMBER DETAILS

BT Employer number (7–8 numbers)

Employer name

BT Member number (12–13 numbers)

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Daytime phone number

Mobile phone number

Email address*

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

2. NATURE OF FINANCIAL ADVICE

3. AMOUNT OF MEMBER ADVICE FEE

A Member Advice fee may be charged on an up-front or ongoing basis. The maximum total amount that can be deducted as a Member Advice fee each year is \$5,000.

You must complete Section 3A and/or 3B.

3A UP-FRONT MEMBER ADVICE FEE

A once-off Member Advice fee of: \$

This amount will be deducted from your Investment Option(s) on a pro-rata basis.

3B ONGOING MEMBER ADVICE FEE

An ongoing Member Advice fee of:

\$ per month

This amount will be deducted from your Investment Option(s) on a pro-rata basis at the end of each month.

Indicate which will apply

Number of Payments (please specify the number of payments to be made)

OR

Until advised otherwise

4. MEMBER DECLARATION AND SIGNATURE

I agree to the amount specified in section 3 being deducted from my super account and paid to the planner listed in section 5 of this form.

I confirm that the amount deducted and paid to the planner is solely in relation to advice the planner provides to me in relation to my benefits in the my BT Business Super account.

Signature of Member

Date (dd/mm/yy)

**FINANCIAL PLANNER MUST SIGN AND DATE
THIS FORM ON THE NEXT PAGE**



03-03-131-01

5. PLANNER USE ONLY

Planner given name(s)

Planner surname

Adviser number

A

PLANNER DECLARATION AND SIGNATURE



I confirm that the Member Advice fee being deducted from the member's super account is solely in relation to advice in respect of benefits in the BT Business Super.

As a Westpac Financial Planner, by signing this form I declare that I am a representative of Westpac Banking Corporation (AFSL No 233 714) and I am authorised to advise on the BT Business Super.

Signature of **Planner**

Date (dd/mm/yy)

You can submit this form by:

-  mail BT Business Super
GPO Box 2362, Adelaide SA 5001
-  fax (02) 9274 5402

6. TERMS AND CONDITIONS

1. A Member Advice fee is only payable to Westpac Banking Corporation. A Member Advice Fee Form received from an adviser that is not a Westpac Financial Planner will be rejected.
2. The Member Advice fee to be deducted must relate solely to advice in respect of the Member's interest in the BT Business Super Plan.
3. Any Ongoing Member Advice fee established will continue to be paid to Westpac Banking Corporation even if the adviser subsequently changes, as long as all other aspects of the advice and the Member Advice fee have not changed.
4. An Upfront Member Advice fee will be charged on the date of processing and will be deducted from the Member's Investment Option(s) on a pro-rata basis.
5. An Ongoing Member Advice fee will be deducted from the Member's Investment Option(s) on a pro-rata basis at the end of each month.