



Dealer Group Registration and Change of Details

BT Adviser Services © 1800 025 127 (8.00am – 6.30pm Mon-Fri Sydney time)
BT Margin Lending Contact Centre © 1800 671 409

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

Use this form to set up a new dealer group for BT Retail/Corporate Super and/or Margin Lending products, or change the details of an existing dealer group.

Please take the following action based on the information provided

- Register a new dealer group (Complete all sections)
- Change the details of an existing dealer group (Relevant sections to your change)

BT Adviser number

A

AND

Margin Lending Adviser number

1. NEW DEALER GROUP DETAILS

Dealer Group name

Please provide the adviser's AFSL Number/ASIC Authorised Representative Number and attach a copy of AFSL.

2. NEW DEALER CONTACT DETAILS

Office address

State Postcode

Postal address (if different from above)

State Postcode

Daytime phone number

()

Mobile phone number

Fax number

()

Email address

3. BANK ACCOUNT FOR FEE PAYMENTS

Fees will be paid into the following account

Name of financial institution

Branch name

BSB number

Account number

Account holder's name

4. TAXATION DETAILS

Please provide the Australian Business Number (ABN) of the Licensee. Fees cannot be paid if an ABN is not supplied.

Australian Business Number (ABN)

5. INVESTOR TRANSFER

If investors are to be transferred to the new dealer group please provide the existing adviser code and name, and complete a Bulk Investor Transfer form or Single Investor Transfer form available from bt.com.au

Previous adviser name

Previous BT adviser number

A

OR

Previous Margin Lending adviser number

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6. ADVISER SIGNATURE

This section need to be signed by an Authorised Signatory of the new Dealer Group.

Signature of Adviser

Date (dd/mm/yy)


Signatory's name (please print)

Adviser stamp (please use black ink only)

You can submit this form by:


Retail Corporate/Super

 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