BT Margin Lending
Separately Managed Accounts (SMA) — Partial Redemption Form

Use this form to sell investments in your SMA Account.

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

QUESTIONS?

If you are a direct investor:
- call BT Customer Relations Consultants on 1800 816 222, or
- email us at client.marginlending@btfinancialgroup.com.

If you are a financial planner:
- call BT Adviser Relations on 1800 671 409
- email us at adviser.marginlending@btfinancialgroup.com.

Phone lines are available Mon – Fri from 8.00am – 6.30pm (AEST).

1. BORROWER'S DETAILS

Borrower's name(s)

Borrower's BT Margin Lending Client Code

Borrower's SMA account number

S M A

2. REDEMPTION (SALE) INSTRUCTIONS

Nominate the total value of your SMA investment to be sold

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Note: *Sales of your investments will commence on the next Rebalancing Date (as defined in the relevant Product Disclosure Statement) following receipt of the approved request (BT Margin Lending must approve the sale of any security on the loan.) All proceeds of the sale of investment will settle to your BT margin loan. If you wish to receive a cash amount, please complete section 3.*

Please Note: The amount you select to be sold will be proportioned across your SMA account according to your portfolio weighting.

3. CASH ADVANCE

☐ Credit the amount below to the nominated bank account attached to my BT margin loan. I confirm, if I am an individual, that the proceeds of the cash advance will not be used wholly or predominantly for a National Credit Code purpose.

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Name of financial institution

Branch name

BSB number

Account number

Account holder's name(s)

Note: The bank account details provided will only be used for this one off cash advance. Please note that your margin loan should predominantly be used for

business or investment purposes.

4. SIGNING SECTION

The borrower/s is/are required to sign this form.

For Company or Company Trustee or Borrowers, either two Directors, or one Director and the Secretary, or the Sole Director and Secretary must sign. Please indicate your company capacity by marking the appropriate box below your signature.

By signing this form you authorise BT Margin Lending to facilitate the above transactions and instruct the responsible entity for the SMA as necessary.

Signature of **Borrower**

Date (dd/mm/yy) / /

Signatory's full name *(please print)*

Director ☐ Sole Director/Sole Secretary ☐

Signature of **Additional Borrower**

Date (dd/mm/yy) / /

Signatory's full name *(please print)*

Director ☐ Company Secretary ☐

You can submit this form by:

mail BT Margin Lending
GPO Box 3917, Sydney NSW 2001

fax **This form cannot be faxed**