



BT Margin Lending Separately Managed Accounts (SMA) — Investment Portfolio adjustment form

Use this form to make amendments to your current Separately Managed Account portfolio weightings and distribution option.

Complete this form using **black pen** – print in clear **CAPITAL LETTERS** and mark answer boxes with an **[x]**

QUESTIONS?

If you are a direct investor:

- call our BT Customer Relations Consultants on 1800 816 222, or
- email us at client.marginlending@btfinancialgroup.com

If you are a financial planner:

- please call BT Adviser Relations on 1800 671 409
- email us at adviser.marginlending@btfinancialgroup.com

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

1. BORROWER AND INVESTOR DETAILS

Borrower's name(s)

Borrower's BT Margin Lending Client Code

Borrower's SMA account Number

S M A

2. CHANGE PORTFOLIO WEIGHTINGS

Indicate the change you would like to make to your SMA account portfolio weightings. You can only change your portfolio to the models that are outlined in the relevant PDS.

Current Portfolio

Model Name	Model Code	Percentage
Total (must equal 100%)		

Requested Changes

Model Name	Model Code	Percentage
Total (must equal 100%)		

Note: This change will occur on the next rebalancing date and will override any previous.

3. CHANGE DISTRIBUTION OPTION

Change your current distribution option

Note: Please allow up to 5 business days for this request to be processed. If no selection is made then your current option will remain.

Reinvest Paid to the BT Margin loan

Paid to the bank account nominated below.

Name of financial institution

Branch name

BSB number

Account number

Account holder's name(s)

4. SIGNING SECTION

For Company or Company Trustee, Borrowers and/or Third Party Security providers, 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 matters and instruct the responsible entity for the SMA as necessary.

Signature of **Borrower**

Date (dd/mm/yy)

Signatory's full name (please print)

Sole Director/Sole Secretary Company Director

Signature of **Additional Borrower**

Date (dd/mm/yy)

Signatory's full name (please print)

Company Secretary Company Director

You can submit this form by:

- mail BT Margin Lending
GPO Box 3917, Sydney NSW 2001
- fax (02) 9274 5782