# BT Margin Lending
# Separately Managed Accounts (SMA) — Additional Investment Form

**Use this form to authorise BT Margin Lending to make additional investments into your SMA account. BT Margin Lending will transfer a specified sum to your SMA account. The additional investment will occur on the next available date for investment, once the funds have been received. Note: The minimum additional investment amount is $500.**

*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

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Borrower's SMA account number

S M A

## 2. ADDITIONAL INVESTMENT INSTRUCTIONS

You can choose to instruct BT Margin Lending to debit a specified amount from your nominated bank account and draw down funds from your BT margin loan for a total additional investment amount.

| | Amount |
|---|---|
| ☐ **Debit the nominated bank account for a one off amount** The amount specified will be debited from your nominated bank account | $ |
| ☐ **Draw down from my BT Margin Loan** The amount specified will be drawn from your margin loan. This will increase your loan balance. | $ |
| **Total additional investment** | $ |

***Note:** The amount drawn from your BT margin loan is subject to your borrowing limit and your credit limit.*

## 3. SIGNING SECTION

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

For Company or Company Trustee account holders, 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.

Signature of **Borrower 1**

Date (dd/mm/yy) / /

Signatory's full name *(please print)*

Director ☐ Sole Director/Sole Secretary ☐

Signature of **Borrower 2**

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**