



# BT Investment Funds Additional Investment Request

BT Contact Centre © 132 135 (8am–6.30pm Mon-Fri, Sydney time)

The Responsible Entities for the Funds offered through BT Investment Funds are BT Funds Management Limited ABN 63 002 916 458, AFSL 233724, BT Funds Management No. 2 Limited ABN 22 000 727 659, AFSL 233720 and Westpac Financial Services Limited ABN 20 000 241 127, AFSL 233716.

- Please note some investors may need to complete the application from a current BT Investment Funds Product Disclosure Statement (PDS). Before completing this form please check with BT Customer Relations on 132 135.

**Please note you can make additional investments on BT Online if you have a BT Online password. See [www.bt.com.au](http://www.bt.com.au) for log-in instructions.**

- The information collected on this form is governed by the BT Privacy Policy which is available online at [www.bt.com.au](http://www.bt.com.au).

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

## 1. INVESTOR DETAILS

Investor number

C

### INVESTOR A – INDIVIDUALS, JOINT INVESTORS OR TRUSTEES

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Daytime phone number

( )

Mobile phone number

- Check this box to receive an SMS confirmation once your additional investment request has been processed.\*

Email address\*\*

### INVESTOR B – JOINT INVESTORS OR TRUSTEES

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Daytime phone number

( )

Mobile phone number

- Check this box to receive an SMS confirmation once your additional investment request has been processed.\*

Email address\*\*

### COMPANIES, ASSOCIATIONS OR OTHER INVESTORS

Full company name, association or other investor

Mobile phone number

( )

- Check this box to receive an SMS confirmation once your additional investment request has been processed.\*

### NAME OF TRUST ACCOUNT

Provide your account reference (where account is held on behalf of others)

\* BT provides this service free of charge. An SMS confirmation message will only be sent to an Australian mobile number. Please specify either Investor A, Investor B or Company/Association to receive the SMS confirmation – multiple messages cannot be sent. In the future, BT may choose to send you an SMS confirmation for other transactions as and when they occur. For full terms of service, please go to [bt.com.au](http://bt.com.au)

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

## 2. THIS INVESTMENT

How will your additional (one-off) investment be made?

Note: Cash is not accepted

Cross [X] the relevant box.

Cheque	<input type="checkbox"/> Make cheques payable to: 'BTFG – BIF – <investor name>' (endorsed cheques not accepted)
Direct Debit	<input type="checkbox"/> Make sure you also complete Direct Debit Request account details in Section 3.

### 3. DIRECT DEBIT REQUEST ACCOUNT DETAILS

Account holder(s) must complete this section if you want us to debit an account with your financial institution.

**! Only Australian financial institution account details will be accepted.**

Name of financial institution

Branch name

BSB number

Account number

Account holder's name(s)

  

### ALL FINANCIAL INSTITUTION ACCOUNT SIGNATORIES MUST SIGN AND DATE BELOW

#### Direct Debit Authority

By signing this Direct Debit Request, I/we:

- authorise BT Funds Management Limited ABN 63 002 916 458 (User ID 0001538), BT Funds Management No. 2 Limited ABN 22 000 727 659 (User ID 021567) and Westpac Financial Services Limited ABN 20 000 241 127 (User ID 012419) to, until further notice, arrange for funds to be debited from my/our account at the institution identified above through the Bulk Electronic Clearing System
- acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Request Service Agreement at the end of this form.

#### Where the investor is not the nominated bank account holder:

I/We consent to the investor(s) increasing amounts or making additional investments without further approval from me/us.

If you **do not** agree with this declaration, please [**X**] this box.

**In the case of corporate signatories, two directors or a director and a company secretary must sign unless a sole director and sole secretary.**

Signature of **Account holder A or company officer**

Date (dd/mm/yy)

Signatory's full name (please print)

Director  Sole Director/Sole Secretary

Signature of **Account holder B or company officer**

Date (dd/mm/yy)

Signatory's full name (please print)

Director  Company Secretary

**! Please ensure section 7: Declaration and Investor Signature is also completed.**

## 4. INVESTMENT DETAILS

Enter the amount to be invested in each investment option <sup>1</sup>			Regular Investment Plan <sup>1</sup>	Flexi Payment Plan <sup>2</sup>	Distribution options		
<i>There is no minimum amount for additional investments into an existing holding or if starting a new Fund.</i>			<i>Complete if you wish to start a Regular Investment Plan.</i>	<i>Complete if you wish to receive a fixed payment from your investment at the end of each distribution period.</i>	<i>Select a distribution option – cross (X)<sup>4</sup>. If you do not select a distribution option and have not set up a Flexi Payment Plan, this will be treated as a request to reinvest your distribution.</i>		
Investment options	Adviser use only	Specify amount below for the investment	Specify amount for your Regular Investment Plan and also complete Section 5	Specify amount for your Flexi Payment Plan and also complete Section 6	Reinvest	Pay to bank (complete section 6)	Pay to BT Cash Management Trust <sup>3</sup>
<b>Diversified</b>							
BT Future Goals Fund	BTA0044AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-manager Growth Fund	BTA0080AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Active Balanced Fund	RFA0020AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Tax Effective Income Fund	RFA0034AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-manager Balanced Fund	BTA0077AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Barclays Diversified Growth	WFS0089AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder Balanced	WFS0094AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Income Plus Fund	BTA0042AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-manager Conservative Fund	BTA0078AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UBS Defensive Investment	WFS0097AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Diversified Shares</b>							
BT Diversified Share Fund	RFA0033AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi-manager Diversified Share Fund	BTA0079AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>International Shares</b>							
BT International Fund	BTA0024AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Core Hedged Global Share Fund	RFA0030AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT American Share Fund	BTA0023AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Asian Share Fund	BTA0026AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT European Share Fund	BTA0025AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Japanese Share Fund	BTA0131AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Technology Fund	BTA0127AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Partner International Shares Core 1	BTA0249AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Partner International Shares Growth 1	BTA0075AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Partner International Shares Value 1	BTA0076AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Credit Suisse International Share	WFS0090AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Intech High Opportunity	WFS0390AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Platinum International	WFS0092AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UBS International Share	WFS0099AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Australian Shares</b>							
BT Australian Share Fund	BTA0021AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Imputation Fund	RFA0019AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Geared Imputation Fund	RFA0062AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Smaller Companies Fund	RFA0012AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Partner Australian Shares Core 1	BTA0072AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Partner Australian Shares Growth 1	BTA0073AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Partner Australian Shares Value A	BTA0074AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investors Mutual Australian Share	WFS0091AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder Australian Shares	WFS0093AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UBS Australian Share	WFS0096AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Property</b>							
BT Property Securities Fund	BTA0051AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BT Global Property	WFS0387AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
APN Property for Income	WFS0088AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Fixed Interest</b>							
BT Fixed Interest Fund	RFA0002AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Schroder Hybrid Securities	WFS0095AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UBS Diversified Fixed Income Fund	WFS0098AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Cash</b>							
BT Cash Management Trust	BTA0002AU	\$	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>TOTAL</b>		\$	\$	\$			

1 A Contribution fee may be deducted from any amount invested.

2 Flexi Payment Plan payments can only be made to a nominated bank account, credit union or building society account, which must not be in the name of a third party.

3 You must be a BT Cash Management Trust investor to have your distributions from other funds paid into the BT Cash Management Trust.

4 BT must be notified of a change in distribution option at least seven days before the scheduled distribution for it to be effective that period.

## 5. REGULAR INVESTMENT PLAN DETAILS

How is your Regular Investment Plan monthly investment to be made?

Cross [X] the relevant box.

Direct Debit	<input type="checkbox"/> Make sure you also complete Section 3.
Payroll deduction	<input type="checkbox"/> Make sure you also complete the separate Payroll Deduction Authority form.

## 6. PAYMENT/DISTRIBUTION ACCOUNT DETAILS

Complete this section if distributions, withdrawals or Flexi Payment Plan payments are to be made to a financial institution account.

Write 'as above' if same as direct debit account.

**! Only Australian financial institution account details will be accepted.**

Name of financial institution

Branch name

BSB number

Account number

Account holder's name(s)

  

## 7. DECLARATION AND INVESTORS SIGNATURE

In signing this Additional Investment Request form, I/we:

- acknowledge that I/we have read and understood a copy of the current BT Investment Funds Product Disclosure Statement (PDS) and I/we agree to be bound by the PDS and the relevant constitution(s), each as amended from time to time.
- declare that all the details given in this application are true and correct.

### ALL INVESTORS MUST SIGN AND DATE THIS FORM

If signing under Power Of Attorney, you verify that at the time of signing, you have not received notice of revocation of that power. Please provide an originally certified copy of the Power Of Attorney including the appointed Power Of Attorney's signature, if not already provided to us.

In the case of corporate signatories, two directors or a director and a company secretary must sign unless a sole director and sole secretary.

Signature of **Account holder A or company officer**

Date (dd/mm/yy)

Signatory's full name (please print)

Director  Sole Director/Sole Secretary

Signature of **Account holder B or company officer**

Date (dd/mm/yy)

Signatory's full name (please print)

Director  Company Secretary

**You can submit your completed form by:**

- ✉ mail BT Financial Group  
GPO Box 2675 Sydney NSW 2001

## DIRECT DEBIT REQUEST SERVICE AGREEMENT

By completing the Direct Debit Request that forms part of this Form, you will be providing BT Funds Management Limited ABN 63 002 916 458, BT Funds Management No.2 Limited ABN 22 000 727 659 and Westpac Financial Services Limited ABN 20 000 241 127 (each a 'Responsible Entity') (each Responsible Entity is part of the BT Financial Group and is referred to in this agreement as 'we', 'our' or 'us') with the ability to debit your nominated account and transfer the amount you request to your investment. This agreement sets out the terms on which you authorise us to deduct from your account with your financial institution any amounts that become payable to an investment with us.

### Direct Debit arrangements

- For initial applications made by completing a Direct Debit Request, we will debit the amount(s) nominated from your account generally within two Business Days of receiving a valid application.
- For subsequent investments, when we receive a valid instruction either by phone, letter or over the internet, we will debit your account generally within two Business Days of receiving the instructions (provided we have previously received a valid Direct Debit Request).
- A valid instruction will be an instruction given by you or from a person nominated by you to provide such instructions.

### Regular Investment Plan arrangements

- For investments made under a Regular Investment Plan, we will debit your account on or around the 19th of each month.
- Where the due date falls on a non-Business Day, we will draw the amount on the next Business Day. If you are uncertain as to when the debit will be processed to your nominated account, you should enquire directly with your financial institution where the account is based.

### Your Responsibilities

It is your responsibility to:

- ensure that your financial institution allow direct debits on your nominated account
- ensure that your nominated account details are correct, and if uncertain, to check with your financial institution before completing the Direct Debit Request
- ensure that sufficient cleared funds are available in your nominated account by the due date to permit payments under the Direct Debit Request.
- ensure that the authorisation given to draw on your nominated account is identical to the account signing instruction held by your financial institution where the nominated account is based
- advise us if your nominated account is transferred or closed or your nominated account details change
- arrange with us a suitable alternate payment method if the drawing arrangements are cancelled either by you or your financial institution.

### Your rights

- You may cancel, alter, defer or suspend your Direct Debit Request, or stop or suspend an individual debit from taking place, by calling BT Customer Relations. In some cases we will require your written confirmation.

- You must notify us at least seven Business Days before the next scheduled debit to ensure changes are effective that month. Notification received after that time may result in your changes taking effect in the following month. You may also be able to stop an individual debit by contacting your own financial institution. You may be liable for financial institution charges if you do this; the financial institution should have information on these.
- If you have any questions or concerns about your Direct Debit Request, such as where you consider that a drawing has been initiated incorrectly, you should take the matter up directly with us by calling BT Customer Relations. Alternatively, you can contact us by email or in writing to the Complaints Officer at the addresses set out on the inside cover of this PDS. We will let you know that we have received your complaint and a Complaints Officer will try to resolve your complaint within 30 days. If you are still not satisfied you can refer the matter to the Financial Industry Complaints Service (FICS) by calling 1800 335 405.

**Our commitment to you**

- We will only change the amount of the payment under the Direct Debit Request on receipt of a valid instruction.
- We will only vary the terms of this agreement after giving you 30 days notice in writing.
- We reserve the right to cancel your drawing arrangements if two or more consecutive drawings are returned unpaid by your nominated financial institution Standard government fees, duties and bank charges (including dishonour fees and conversion costs) may apply to investments. These are paid by the investor.
- We will keep all your records and information pertaining to your nominated account at the financial institution private and confidential, except where you have made a claim relating to a debit you believe has been made incorrectly, or wrongfully, in which case Westpac Banking Corporation ABN 33 007 457 141 (as our sponsor in the Bulk Electronic Clearing System) may require us to provide this information to them in connection with your claim to the extent necessary to resolve your claim.

**8. ADVISER USE ONLY**

BT Adviser number

**A**

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Phone number

( )

Fax number

( )

Mobile phone number

Office postcode