



BT Business Super Spouse Application Form

Issued 16 January 2012

BT Contact Centre © 132 135 (8.00am – 6.30pm Mon-Fri Sydney Time)

Westpac Securities Administration Limited ABN 77 000 049 472
AFSL 233731 RSE L0001083 is the Trustee of BT Business Super
RSE R1003970 ABN 81 236 903 448

You must read the BT Business Super (BT Super) Product Disclosure Statement (PDS) in full before making an investment decision and completing this application form.

If you do not have a copy of the BT Super PDS, please contact the BT Contact Centre on 132 135 or download a copy from our website at www.bt.com.au.

This application form is for a spouse of an existing member who wishes to join the existing members employer sponsored plan within BT Super

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

1. PERSONAL DETAILS

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date (dd/mm/yyyy)

Gender

Male Female

Postal address

State Postcode

Residential address – if different from above

State Postcode

Daytime phone number

()

Mobile phone number

Email address* (please supply)

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

2. TAX FILE NUMBER

Tax file number (TFN)

We are authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993 (SIS).

It is not an offence if you do not quote your TFN. However, giving your TFN will have the following advantages, which may not otherwise apply:

- we will be able to accept all types of contributions to your account(s);
- you will not be subject to extra tax for making contributions without a TFN;
- other than the tax that might ordinarily apply, no additional tax will be deducted when you start drawing down on your superannuation benefits; and
- it will be much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

If provided, your TFN will be used for legal purposes only, including sending it to another superannuation provider when your benefits are being transferred, unless you notify us otherwise in writing, in which case it will be kept confidential. These purposes may change in the future if the law changes.

3. ELIGIBILITY TO CONTRIBUTE

Please select your age and the criteria under which your contributions will be made, *select all that apply*.

I am under age **65**

I am aged **65 – 74**

with mandated employer contributions being made on my behalf (Superannuation Guarantee contributions only to age 70)

with contributions other than mandated employer contributions being made by me or on my behalf and I have been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year (spouse contributions only to age 70)

I am aged **75 or more**

with mandated employer contributions (other than Superannuation Guarantee contributions) being made on my behalf.



03-03-112-04

4. EMPLOYMENT DETAILS

ARE YOU CURRENTLY GAINFULLY EMPLOYED?

No *If you are currently not working, what is your status?*

Home Duties/Not Employed

Unemployed

Retired

Not working due to ill health

Last date of employment (dd/mm/yyyy)

/ /

Yes Self-employed

Yes Employed

Full time

Permanent part-time

Casual

COMPLETE THE FOLLOWING IF YOU ARE EMPLOYED OR SELF-EMPLOYED

Number of hours worked each week

Annual Income¹

\$

What is your occupation?

What is your industry (eg mining)?

¹ Please refer to the 'Definitions and interpretation of insurance terms' section of the BT Super Additional Information Booklet for the definition of 'Income'.

5. EXISTING MEMBER DETAILS

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date (dd/mm/yyyy)

/ /

Gender

Male Female

BT Member number (if known)

BT Employer number (if known)

BT Employer name

6. INITIAL CONTRIBUTION DETAILS

Note: Cash is not accepted. Minimum initial investment of \$500 required.

How will initial contributions be made?		Cheque	BPAY
Member contributions	\$	<input type="checkbox"/>	<input type="checkbox"/>
Spouse contributions	\$		
Contributions relating to small business concessions	\$		▶ <i>attach ATO election form</i>
Direct termination payments	\$		▶ <i>attach employer documentation</i>
Contributions from certain personal injury settlements or orders	\$		▶ <i>attach ATO election form</i>
ATO Super Guarantee Voucher	\$		
Rollovers from other superannuation funds	\$		
How many? ▶	<input type="text"/>		

Rollover Details*

Name of rollover institution	Estimated amount
	\$
	\$
	\$
	\$
	\$

* If you are rolling over funds and you have not already initiated the transaction, please complete a Request to Transfer form for each rollover.

7. INVESTMENT STRATEGY

Your money will be invested in the employer Default Investment Option applicable to your plan unless you nominate otherwise below.
(A maximum of 6 Investment Options may be selected.)

Risk Category	Investment Option	Asset Class*	OFFICE USE ONLY		% Contribution <i>You can select a maximum of 6 Investment Options. Indicate the % for each below.</i>
			APIR Codes	Unit Code	
Stable	Westpac Money Market	C	WFS0513AU	(074)	%
Conservative	Westpac Australian Fixed Interest	D	WFS0105AU	(072)	%
	Westpac International Fixed Interest	D	WFS0107AU	(073)	%
	Macquarie Diversified Fixed Interest	D	WFS0397AU	(098)	%
	BT Multi-manager Conservative	F	WFS0087AU	(057)	%
	Westpac Moderate Growth	F	WFS0512AU	(053)	%
Moderate	Westpac Balanced Growth	D	WFS0514AU	(052)	%
	BT Multi-manager Balanced	D	WFS0086AU	(056)	%
	BT Active Balanced	D	WFS0111AU	(051)	%
	Schroder Balanced	D	WFS0081AU	(061)	%
	Colonial First State Diversified	D	WFS0120AU	(059)	%
	Westpac Australian Property Securities	P	WFS0247AU	(071)	%
Dynamic	BT Multi-manager Growth	D	WFS0085AU	(055)	%
	BT Australian Sustainability Share	AS	WFS0082AU	(063)	%
	MLC Growth	D	WFS0122AU	(058)	%
	Westpac Australian Shares	AS	WFS0106AU	(064)	%
	BT Partner Australian Shares Core 1	AS	WFS0371AU	(086)	%
	BT Partner Australian Shares Growth 1	AS	WFS0372AU	(087)	%
	BT Partner Australian Shares Value 1	AS	WFS0373AU	(088)	%
	Colonial First State Australian Shares	AS	WFS0249AU	(065)	%
	Aberdeen Classic Series Australian Small Companies	AS	WFS0395AU	(102)	%
	ING Blue Chip Imputation	AS	WFS0083AU	(066)	%
	Westpac Dynamic Growth	D	WFS0104AU	(050)	%
	Investor Mutual Australian Share	AS	WFS03375AU	(091)	%
	BT Global Property	P	WFS0394AU	(099)	%
Aggressive	BT Multi-manager High Growth	IS	WFS0253AU	(068)	%
	BT Partner International Shares Growth 1	IS	WFS0376AU	(089)	%
	BT Partner International Shares Value 1	IS	WFS0374AU	(090)	%
	BT Partner International Shares Core 1	IS	WFS0398AU	(100)	%
	Westpac International Shares	IS	WFS0108AU	(067)	%
	Aberdeen Actively Hedged International Equities	IS	WFS0080AU	(070)	%
	MLC Global Shares	IS	WFS0251AU	(069)	%
	BT Core Global Shares	IS	WFS0253AU	(068)	%
Total Investment					100 %

*Asset Class: D – Diversified, IS – International Shares, AS – Australian Shares, P – Property, F – Fixed Interest, C – Cash

8. CHECKLIST

- Have you entered your Tax File Number in Section 2?
- Have you indicated 'Eligibility to Contribute' in Section 3?
- Have you completed your Employment Details in Section 4?
- If you are rolling over from an external fund, have you completed a Request to Transfer form and sent it to the other Rollover Fund?
- Have you signed the Signature & Declaration Section 9?

9. SIGNATURE AND DECLARATIONS

Before you sign this Spouse Application Form, the Trustee is obliged to give you a copy of the BT Super PDS. This will help you understand the product and decide whether it is appropriate to your needs.

In signing this application I acknowledge that:

- I have received, read and understood the PDS;
- I agree to, consent to and acknowledge the declarations, conditions and acknowledgements provided throughout the PDS and declare that all given details in this application are true and correct.

I understand that:

- an investment in BT Business Super is not a deposit with or any other liability of Westpac Banking Corporation ABN 33 007 457 141 or any other company in the Westpac Group of companies;
- an investment in BT Business Super is subject to investment risk, including possible delays in repayment or loss of income and principal invested;
- none of the Westpac Banking Corporation or its related entities stand behind or otherwise guarantee the capital value or investment performance of any Investment Option offered in the PDS.

Where this application form has been downloaded from an electronic file:

- you acknowledge that, prior to making this application you personally received the electronic PDS or a printout of it, attached to or accompanying this application form;
- you understand that the law prohibits any person passing this application form to another person unless it is attached to, or accompanied by, the complete and unaltered PDS; and
- the Trustee will send to you, upon request and free of charge, the paper version or the electronic PDS that accompanies this application form, during the life of the PDS.



YOUR APPLICATION CANNOT PROCEED IF THIS SECTION IS NOT SIGNED

Signature of **Spouse**

Date (dd/mm/yy)

Signatory's name *(please print)*

You can submit this form by:

-  mail BT Business Super
GPO Box 2362, Adelaide SA 5001
-  fax (02) 9274 5402