

4. INVESTMENT SWITCH AND PAYMENT DETAILS

Please note: Requests must be received before the 6th of the month to enable pension payment from the new portfolios in that month.

Instructions

(Select one box only) **Note:** income payment allocations must be in **whole number %** – no decimals

- Switch your current balance – please use the **'Investment switch'** column
- Change the portfolios from which your pension is paid– please use the **'Income payment details'** column
- Switch your current balance AND change the portfolios from which your pension is paid – please use both columns

Portfolio	Investment Switch		Income payment details		Office use only			
	Switch from <input type="checkbox"/> units or <input type="checkbox"/> \$	Switch to <input type="checkbox"/> units or <input type="checkbox"/> \$	\$ Amount OR	% Payment	Contribution fee		Nil contribution fee	
					Trust code	APIR codes	Trust code	APIR codes
Stable								
BT Cash			\$	%	CI1	RFA0008AU	CI2	RFA0050AU
Conservative								
BT Conservative			\$	%	CO1	RFA0492AU	CO2	RFA0049AU
Moderate								
BT Active Balanced			\$	%	AB1	RFA0493AU	AB2	RFA0048AU
Dynamic								
BT Core Australian Share			\$	%	AS1	RFA0116AU	AS2	RFA0046AU
BT Diversified Share			\$	%	DS1	RFA0494AU	DS2	RFA0047AU
BT Ethical Share			\$	%	ES1	RFA0123AU	ES2	RFA0044AU
BT Imputation Share			\$	%	IM1	RFA0128AU	IM2	RFA0045AU
Aggressive								
BT Core Global Share			\$	%	GS1	RFA0117AU	GS2	RFA0043AU
Total:			\$	100%				

└ 2 amounts must be equal ─┘

5. DECLARATION

I understand that the transaction will be made under the current terms and conditions of the BT Classic Lifetime – Flexible Pension Trust Deed and offer document.



Signature of Investor

Date (dd/mm/yy)

 / /

Signatory name (please print)

You can submit this form by:

-  mail BT Classic Lifetime – Flexible Pension
GPO Box 2675, Sydney NSW 2001
-  fax (02) 9274 5780