

- Please complete the form using a BLACK PEN. Print well within the boxes in clear CAPITAL LETTERS. Mark answer boxes with a cross (X). Start at the left of each answer space and leave a one box gap between words.
- Questions? Please call BT Customer Relations on 132 135, from 8.00am to 6.30pm (Sydney time), Monday to Friday.
- **You can change or suspend your Flexi Payment Plan by contacting us at least seven business days before the end of the distribution period in which you wish to make the change. Payments are paid directly into your Bank account at the end of the Fund's distribution period (refer to the BT Investor Choice Product Disclosure Statement for distribution frequencies).**
- Australian Financial Services Licence No. 233716.

**BT Customer
Relations**
☎ 132 135

1. BT INVESTOR DETAILS

BT investor number

C

INVESTOR A – INDIVIDUALS, JOINT INVESTORS OR TRUSTEES

Title

Mr Mrs Miss Ms Other

Last name

Given name(s)

Phone number during business hours

INVESTOR B – JOINT INVESTORS OR TRUSTEES

Title

Mr Mrs Miss Ms Other

Last name

Given name(s)

Phone number during business hours

COMPANIES, ASSOCIATIONS OR OTHER INVESTORS

Full name of company, association or other investor

ACCOUNT REFERENCE

Where account is held on behalf of others

2. REASON FOR COMPLETING THIS FORM

- I am starting a **new Flexi Payment Plan**.
- I am **changing an existing Flexi Payment Plan**. This request replaces any previous request.

3. FLEXI PAYMENT PLAN DETAILS

Nominate the fixed amount you would like to receive from your investment. Specify the amount to be paid from each Fund.

Contribution Fee Funds

Westpac Moderate Growth Fund	WFS0032AU	\$
Westpac Balanced Growth Fund	WFS0033AU	\$
Westpac Dynamic Growth Fund	WFS0034AU	\$
Westpac Cash Management Trust	WFS0011AU	\$
Westpac Australian Bond Fund	WFS0013AU	\$
Westpac Australian Property Securities Fund	WFS0101AU	\$
Westpac All Australian Tax Effective Share Fund	WFS0103AU	\$
Westpac All Australian Growth Share Fund	WFS0102AU	\$
Westpac Sustainability Fund – Australian Shares	WFS0289AU	\$
Westpac Sustainability Fund – International Shares	WFS0290AU	\$
Westpac International Share Fund	WFS0023AU	\$

Nil Contribution Fee Funds

Westpac Moderate Growth Fund – NEF ¹	WFS0333AU	\$
Westpac Balanced Growth Fund – NEF ¹	WFS0334AU	\$
Westpac Dynamic Growth Fund – NEF ¹	WFS0335AU	\$
Westpac Australian Bond Fund – NEF ¹	WFS0328AU	\$
Westpac Australian Property Securities Fund – NEF ¹	WFS0329AU	\$
Westpac All Australian Tax Effective Share Fund – NEF ¹	WFS0327AU	\$
Westpac All Australian Growth Share Fund – NEF ¹	WFS0326AU	\$
Westpac Sustainability Fund Australian Shares – NEF ¹	WFS0330AU	\$
Westpac Sustainability Fund International Shares – NEF ¹	WFS0331AU	\$
Westpac International Share Fund – NEF ¹	WFS0332AU	\$

These Funds are available to existing investors in the relevant Fund(s) only

Westpac Australian Growth Share Fund	WFS0022AU	\$
Westpac Australian Tax Effective Share Fund	WFS0021AU	\$
Westpac Conservative Growth Fund	WFS0003AU	\$

Total \$

¹ A withdrawal fee may apply where your nominated amount exceeds your distribution. If a withdrawal fee is payable, we will also withdraw sufficient funds to cover this fee.

BT use only

4. PAYMENT ACCOUNT DETAILS

Flexi Payment Plan payments can only be made to a nominated Australian bank account. Please provide account details here.

Name of Australian financial institution

Branch name

BSB number

Account number

Account name

5. INVESTORS DECLARATION AND SIGNATURE

By signing this application form:

- I/We acknowledge that I/we have read and understood the BT Investor Choice Funds Product Disclosure Statement (PDS) to which this Flexi Payment Plan request relates and I/we agree to be bound by the terms of the PDS and the relevant constitutions(s), each as amended from time to time;
- I/We declare that all the details given in this Flexi Payment Plan request are true and correct.

Joint applicants must all sign unless we have received prior instructions from all investors that any can sign solely.

ALL INVESTORS MUST SIGN AND DATE THIS FORM

If signing under a 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 company signatories, two directors, or a director and a company secretary, must sign unless a sole director and sole secretary.

▶ Signature of Investor **A** or company officer

Date (DD/MM/YYYY)

Signatory name

Company signatories must indicate their company title

Director or Sole director and sole secretary

▶ Signature of Investor **B** or company officer

Date (DD/MM/YYYY)

Signatory name

Company signatories must indicate their company title

Director or Company secretary

6. ADVISER USE ONLY

BT adviser number

Phone number

Title

Mr Mrs Miss Ms Other

Last name

Given name(s)

Please note that this form cannot be faxed unless we have a signed Facsimile Facility Authority on file. You can mail your completed Flexi Payment Plan Request form to:

**BT Financial Group
GPO Box 2675
SYDNEY NSW 2001**