

- 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.
- Please note that you can perform switches on BT Online if you have a BT Online password. See [www.btonline.com.au](http://www.btonline.com.au) for log-in instructions.
- If you do not have a BT PIN or a Regular Investment Plan, you must provide us with a signed switch request and a completed application form from a BT Investment Choice Funds Product Disclosure Statement (PDS) in order to switch between Funds.
- Australian Financial Services License 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. DISTRIBUTION OPTION**

If switching to a new Fund, please select a distribution option below. If no distribution option is nominated for the Fund switched to, distributions will automatically be reinvested. If switching to an existing Fund, previous distribution instructions will still apply.

**Note: If you have a Regular Investment Plan and you make a full switch, the plan will automatically transfer to the Fund(s) to which you are switching.**

- Reinvest
- Pay to bank account on file
- Pay to the following Australian bank account

Name of Australian financial institution

Branch name

Account name

BSB number

Account number

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

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

### 3. SWITCHING DETAILS

You can switch \$1,000 or more to any Fund in which you are already invested, or \$5,000 or more to any new Fund. You must maintain a minimum of \$1,000 in any Fund. If the value of an investment drops below \$1,000 due to a switch, we may switch your entire investment over to your nominated Fund(s).

Please specify whether you are requesting a switch of Units OR Dollars then complete the amount. If switching your entire investment in a Fund(s), write 'full' beside the relevant Fund(s).	<b>Switch From</b> – Specify (X)	<b>Switch To</b> – Specify (X)
	<input type="checkbox"/> Units OR <input type="checkbox"/> Dollars	<input type="checkbox"/> Dollars OR <input type="checkbox"/> % allocation

Contribution Fee Funds			
Westpac Moderate Growth Fund <sup>1</sup>	WFS0032AU		
Westpac Balanced Growth Fund <sup>1</sup>	WFS0033AU		
Westpac Dynamic Growth Fund <sup>1</sup>	WFS0034AU		
Westpac Cash Management Trust	WFS0011AU		
Westpac Australian Bond Fund <sup>1</sup>	WFS0013AU		
Westpac Australian Property Securities Fund <sup>1</sup>	WFS0101AU		
Westpac All Australian Tax Effective Share Fund <sup>1</sup>	WFS0103AU		
Westpac All Australian Growth Share Fund <sup>1</sup>	WFS0102AU		
Westpac Sustainability Fund – Australian Shares <sup>1</sup>	WFS0289AU		
Westpac Sustainability Fund – International Shares <sup>1</sup>	WFS0290AU		
Westpac International Share Fund <sup>1</sup>	WFS0023AU		
Nil Contribution Fee Funds			
Westpac Moderate Growth Fund – NEF <sup>2</sup>	WFS0333AU		
Westpac Balanced Growth Fund – NEF <sup>2</sup>	WFS0334AU		
Westpac Dynamic Growth Fund – NEF <sup>2</sup>	WFS0335AU		
Westpac Australian Bond Fund – NEF <sup>2</sup>	WFS0328AU		
Westpac Australian Property Securities Fund – NEF <sup>2</sup>	WFS0329AU		
Westpac All Australian Tax Effective Share Fund – NEF <sup>2</sup>	WFS0327AU		
Westpac All Australian Growth Share Fund – NEF <sup>2</sup>	WFS0326AU		
Westpac Sustainability Fund Australian Shares – NEF <sup>2</sup>	WFS0330AU		
Westpac Sustainability Fund International Shares – NEF <sup>2</sup>	WFS0331AU		
Westpac International Share Fund – NEF <sup>2</sup>	WFS0332AU		
These Funds are available to existing investors in the relevant Fund(s) only			
Westpac Australian Growth Share Fund <sup>1</sup>	WFS0022AU		
Westpac Australian Tax Effective Share Fund <sup>1</sup>	WFS0021AU		
Westpac Conservative Growth Fund <sup>1</sup>	WFS0003AU		

1\_Contribution fees may apply when switching into this Fund. 2\_Withdrawal fees may apply when switching out of this Fund.

### 4. DECLARATION AND INVESTORS SIGNATURE – ALL INVESTORS MUST SIGN AND DATE THIS FORM

By signing this form:

- I/we acknowledge that I/we have read and understood the current BT Investor Choice Funds PDS to which this Switch Request relates and I/we agree to be bound by the PDS and the relevant constitution(s), each as amended from time to time;
- I/we declare that all details given in this form are true and correct.

Joint applicants must all sign unless we have received prior instructions from all investors that any can sign solely. 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 <b>A</b> or company officer	Date (dd/mm/yyyy)	▶ Signature of Investor <b>B</b> or company officer	Date (dd/mm/yyyy)
<input type="text"/>	/ /	<input type="text"/>	/ /
Signatory name		Signatory name	
<input type="text"/>		<input type="text"/>	

**Company signatories** must indicate their company title

Director or  Sole director and sole secretary

**Company signatories** must indicate their company title

Director or  Company secretary

### 5. ADVISER USE ONLY

BT adviser number	Last name
<b>A</b> <input type="text"/>	<input type="text"/>
Phone number	Given name(s)
<input type="text"/>	<input type="text"/>
Title	▶ Signature of adviser
<input type="text"/>	Date (dd/mm/yyyy)
	/ /