



## 5. BANK DETAILS FOR DIRECT DEBITS PAYMENTS

To make additional investments from a nominated bank account into your BT investment(s) you must complete a Direct Debit Request Form for each of the relevant products. You can obtain the form(s) from [www.bt.com.au](http://www.bt.com.au) or by calling BT Customer Relations on 132 135 from 8.00am to 6.30pm (Sydney time) Monday to Friday.

Additional investments are not available for BT Flexible Pensions or the BT Approved Deposit Fund.

## 6. INVESTOR DECLARATION AND SIGNATURE

### Terms and Conditions

1. By using the BT Link and BT Online electronic transaction facilities, you agree to the following terms and conditions:
2. A confidential Personal Identification Number ('PIN') and confidential Password will allow you to transact and amend certain personal and investment details held by BT. You remain responsible for the confidentiality of your PIN and Password.
3. Your PIN and/or Password may be issued to you electronically.
4. You must inform us immediately if you lose your PIN or Password or if you think that another person has knowledge of it.
5. Access to the electronic transaction facilities will be given to any person who correctly uses your PIN or Password or who complies with any other security procedure in place from time to time. Any action or request by that person will be taken to be made by you and we may rely on that action or request.
6. We may suspend or cancel your ability to perform transactions using the electronic transaction facilities at any time without notifying you.
7. To use the electronic transaction facilities you must have received a current Product Disclosure Statement(s), for the fund or funds that you invest in.
8. When you use the BT Link and BT Online electronic transaction facilities: a) your transaction or amendment request will be processed as soon as practicable; b) you may only apply for units after you have established a direct debit facility with us; and c) your transaction will be processed on the terms of the relevant current Product Disclosure Document(s) and Constitution or Trust Deed (each as amended from time to time) for the fund or funds that you invest in.
9. We may vary these terms and conditions at any time after giving you notice in writing (or by email or other electronic communication for BT Online users).
10. Any action taken or request given to us by you or any other person cannot be countermanded without our consent.
11. You release, discharge and agree to indemnify us from and against all actions, proceedings, accounts, claims, costs, demands, charges and expenses, losses and liabilities, howsoever arising, that may be suffered by you or brought against us in respect of the use of the transaction facilities.

On this form, "we", "our" or "us" refers to:

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 RSE L0001090; BT Funds Management No. 2 Limited ABN 22 000 727 659 AFSL 233720 RSE L0001076; Westpac Financial Services Limited ABN 20 000 241 127 AFSL 233716; Westpac Securities Administration Limited ABN 77 000 049 472 AFSL 233731 RSE L0001083

BT Funds Management Limited is the Trustee of BT Lifetime — Personal Super and BT Lifetime — Flexible Pension ABN 83 953 436 008 RSE R1003864, BT Retirement Selection — Personal Super Plan and BT Superannuation Investment Fund ABN 39 827 542 991 RSE R1001327

BT Funds Management No.2 Limited is the trustee of BT Classic Lifetime – Personal Super and BT Classic Lifetime — Flexible Pension ABN 68 324 870 141 RSE R1003925

Westpac Securities Administration Limited is the Trustee of BT Superannuation Savings Fund ABN 83 835 373 437 RSE R1003963

**!** Who can sign this form?

### Individual

Individual investors sign as Investor A.

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.

### Joint investors

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

Trust or superannuation fund

Individual trustee – Sign as Investor A

Joint trustees – Sign as Investors A and B

Corporate trustee – See company requirements

### Company

Acceptable company signatories are:

- two directors; or
- a director and a company secretary; or
- a sole director and sole secretary/sole trader.

### Club, association or unincorporated body

Office bearer(s) must sign and state their appropriate office title (eg president, secretary).

## YOUR REQUEST CANNOT PROCEED IF THIS SECTION IS NOT SIGNED

Signature of **Investor A, Director or Sole Trader**

Date (dd/mm/yy)

Signatory's full name (*please print*)

Position (*companies only*)

Director  Sole Director/Sole Secretary

**Clubs/Associations/Unincorporated Bodies**

(please indicate office title)

Signature of **Investor B, Director or Company Secretary**

Date (dd/mm/yy)

Signatory's full name (*please print*)

Position (*companies only*)

Director  Company Secretary

**Clubs/Associations/Unincorporated Bodies**

(please indicate office title)

**You can submit this form by:**

- mail BT Financial Group  
GPO Box 2675, Sydney NSW 2001
- fax (02) 9274 5780