



BT Lifetime Super — Employer Plan Member Advice fee

BT Customer Relations ☎ 132 135 (8.00am – 6.30pm Mon – Fri Sydney time)

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724
RSE L0001090 is the Trustee of BT Lifetime Super — Employer Plan
RSE R1001327 ABN 39 827 542 991

Use this form if you wish to:

- To have a Member Advice fee deducted from your account.
 - Amend an existing Member Advice fee arrangement
- Note:** A Member Advice fee can be deducted as:
- A once off up-front fee payable to your financial adviser, or
 - An ongoing fee payable to your financial adviser on a monthly basis.

The personal advice provided must be in respect of your benefits in BT Lifetime Super — Employer Plan.

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

1. MEMBER DETAILS

BT Employer number (7–8 numbers)

Employer name

BT Member number (12–13 numbers)

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Daytime phone number

Mobile phone number

Email address*

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

2. NATURE OF FINANCIAL ADVICE

3. AMOUNT OF MEMBER ADVICE FEE

A Member Advice fee may be charged as an up-front and/or ongoing basis. The maximum total amount that can be deducted as a Member Advice fee each year is \$5,000.

You must complete Section 3A and/or 3B.

3A UP-FRONT MEMBER ADVICE FEE

A once-off Member Advice fee of: \$

This amount will be deducted from your Investment Option(s) on a pro-rata basis.

3B ONGOING MEMBER ADVICE FEE

An ongoing Member Advice fee of:

\$ per month

This amount will be deducted from your Investment Option(s) on a pro-rata basis at the end of each month.

Indicate which will apply

Number of Payments (please specify the number of payments to be made)

OR

Until advised otherwise

4. MEMBER DECLARATION AND SIGNATURE

I agree to the amount specified in section 3 being deducted from my super account and paid to the adviser listed in section 5 of this form.

I confirm that the amount deducted and paid to the adviser is solely in relation to advice the adviser provides to me in relation to my benefits in the my BT Lifetime Super — Employer Plan account.

Signature of **Member**

Date (dd/mm/yy)

**FINANCIAL PLANNER MUST SIGN AND
DATE THIS FORM ON THE NEXT PAGE**



03-17-031-01

5. ADVISER USE ONLY

Adviser given name(s)

Adviser surname

Adviser number

A

ADVISER DECLARATION AND SIGNATURE

I confirm that the Member Advice fee being deducted from the member's super account is solely in relation to advice in respect of benefits in the BT Lifetime Super — Employer Plan.

If I am not a Westpac Financial Planner, by signing this form I:

- declare that I am lawfully authorised to advise on, and deal in, the BT Lifetime Super — Employer Plan under an AFSL and do not provide these services on behalf of any member of the Westpac Group of companies, and
- request BT Funds Management Limited to pay the Member Advice fee to the Dealer Group; and acknowledge that any commission paid in respect of the BT Lifetime Super — Employer Plan is governed by the Terms and Conditions of Commission Payments, a copy of which I acknowledge I have received and read.

If I am a Westpac Financial Planner, by signing this form I:



- declare that I am a representative of Westpac Banking Corporation (AFSL No 233 714) and I am authorised to advise on the BT Lifetime Super — Employer Plan.

I confirm and acknowledge the terms and conditions outlined in section 6 of this form.

Signature of **Adviser**

Date (dd/mm/yy)

You can submit this form by:

-  mail BT Lifetime Super — Employer Plan
GPO Box 2919, Adelaide SA 5001
-  fax (02) 9274 5402

6. TERMS AND CONDITIONS

1. The Member Advice fee to be deducted must relate solely to advice in respect of the Member's interest in the BT Lifetime Super — Employer Plan.
2. Any Ongoing Member Advice fee established will continue to be paid in respect of the adviser named on this form even if the adviser subsequently changes, as long as the new adviser is employed by the same advisory business and all other aspects of the advice and the Member Advice fee have not changed.
3. An Upfront Member Advice fee will be charged on the date of processing and will be deducted from the Member's Investment Option(s) on a pro-rata basis provided that the Trustee agrees to do so.
4. An Ongoing Member Advice fee will be deducted from the Member's Investment Option(s) on a pro-rata basis at the end of each month.