



BT Lifetime Super – Employer Plan Investment Choice/Switch Request

BT Contact Centre ☎ 132 135 (8.00am – 6.30pm Mon-Fri Sydney time)

BT Funds Management Limited ABN 63 002 916 458 AFSL 233 724 RSE L0001090 is the Trustee of BT Lifetime Super – Employer Plan RSE R1001327 ABN 39 827 542 991

- A switch of the current balance can only be processed when your current balance exceeds \$1,500 at the end of the calendar month.
- You can check or switch your current super balance online at bt.com.au
- Unless you advise BT that you would like to specify your investment strategy, your investments will be placed in the Default Investment Option selected by your employer, or if none selected, the Trustee Default Investment Option (currently the BT Multi-manager Balanced Investment Option). This is shown on your new member statement.
- Please complete this form if you are a member:
 - wishing to switch your current Investment Options
 - providing BT with your investment selection for future contributions and rollovers
 - wishing to switch your current balance and to provide an investment selection for future contributions and rollovers.

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

1. MEMBER DETAILS

BT Employer number – if known (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.

You can submit this form by:

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

2. MEMBER DECLARATION AND SIGNATURE

- I wish to switch the existing balance in my super account and/or give instructions on future contributions and rollovers in the Investment Option(s) I have selected. I understand that switching the existing balance will only transfer my current super balance and not my future contributions or rollovers. By completing the future investment instructions, I acknowledge that all future contributions and rollovers will be invested in the Investment Option(s) I have selected.
- I acknowledge that if the Trustee continues to follow an instruction by me to invest my account in accordance with a particular Investment Option, at the time of an additional acquisition of an interest in the underlying fund, I may not have received:
 - the current PDS for the relevant fund; or
 - information about material changes and significant events that affect the relevant fund (that the underlying fund trustee is required to give a person who acquired an interest in the underlying fund directly, unless an exception applies).
- I acknowledge that under certain circumstances allowed under super law and the Trust Deed (for example, where it would prejudice the interests of the other members of the Fund), the Trustee may delay, suspend or not process my application, switch or withdrawal requests.
- I agree to receive all information required or permitted to be given to me under SIS and the Corporations Act, including ongoing notifications, product disclosure statements and supplementary product disclosure statements (or the equivalent information) in respect of underlying investment funds ('Information'):
 - where it is or may become permissible under the Corporations Act, via my adviser in writing or notice by email or other electronic communication (including online); or
 - directly;
 - by email (including emails containing a hypertext link); or
 - by other electronic communication (including online by accessing bt.com.au)
- If I am:
 - a new investor, by making an application to become an investor or by participating in BT Super; or
 - an existing investor, by giving the Trustee an investment direction or switching request, or by me (or someone on my behalf) making further contributions, on or after 1 July 2007.
 I agree that Information can be provided to me in any of these ways.
- I agree that changes to fees and costs, including fees and costs under underlying investment options, may be accessed by me on the website at bt.com.au and that I should only make an investment decision after accessing that information.
- If I request the Trustee to roll over or transfer the whole amount (or a partial amount) of my account, I:
 - waive my right to require the Trustee to roll over or transfer the requested amount within 30 days after receiving all information prescribed by the SIS Regulations (including all information that is necessary to process my request) in respect of the investments the Trustee considers to be illiquid;
 - agree to access the list of investments that the Trustee considers to be illiquid from time to time from bt.com.au and acknowledge that these investments are illiquid for the reasons referred to on the website or in the 'Restrictions on withdrawals' section of the PDS;
 - acknowledge that the maximum period in which my requested transfer must be effected is as set out on the website; and
 - agree that I understand, and accept, that a period longer than the 30 days mentioned above is required (possibly in respect of the whole of the requested transfer amount) due to the illiquid nature of the investment.

Signature of Member

Date (dd/mm/yy)

Signatory's full name (please print)



03-17-005-06

Please complete Investment Options section on next page of form.



3. INVESTMENT OPTIONS

Instructions

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

- Switch my current balance – please use the '**Switch Current Balance FROM**' and '**Switch Current Balance TO**' columns
- Select where all my future contributions and rollovers are invested – please use the '**Future Investment Instructions**' column
- Switch my current balance AND select my Future Investment Options – please use all three (3) columns

Notes: * Please note that if you do not select which Investment Options your investment is to come from, the switch will be prorated across all your Investment Options. Investments in the BT Investor Protected Investment Option cannot be switched. You may provide future investment instructions to be applied when your balance reaches \$1,500 at the end of a calendar month.

* Asset Class: D – Diversified, IS – International Shares, AS – Australian Shares, P – Property, F – Fixed Interest, C – Cash

Investment Option	Asset Class*	OFFICE USE ONLY		Switch Current Balance FROM the Investment Options* below	Switch Current Balance TO the Investment Options* below	Future Investment Instructions* You can select a maximum of 6 Options below
		APIR Codes	Unit Code	% Balance	% Balance	% Contribution
Stable						
BT Cash	C	BTA0511AU	(003)	%	%	%
Conservative						
BT Australasian Bond	F	BTA0028AU	(009)	%	%	%
BT Conservative Outlook	D	BTA0512AU	(002)	%	%	%
BT Global Bond	F	BTA0030AU	(010)	%	%	%
BT Multi-manager Conservative	D	BTA0225AU	(041)	%	%	%
BT Multi-manager Fixed Interest	F	BTA0300AU	(105)	%	%	%
BlackRock Monthly Income Fund	F	BTA0306AU	(110)	%	%	%
Macquarie Conservative	D	BTA0163AU	(027)	%	%	%
Macquarie Diversified Fixed Interest	F	BTA0257AU	(092)	%	%	%
Moderate						
BT Balanced Returns	D	BTA0513AU	(201)	%	%	%
BT Global Property	P	BTA0254AU	(093)	%	%	%
BT Property Securities	P	BTA0034AU	(011)	%	%	%
Westpac Balanced	D	BTA0098AU	(049)	%	%	%
BT Multi-manager Balanced	D	BTA0224AU	(042)	%	%	%
AMP Capital Investors Listed Property	P	BTA0159AU	(035)	%	%	%
BlackRock Scientific Diversified Growth	D	BTA0160AU	(032)	%	%	%
Colonial First State Property Securities	P	BTA0304AU	(108)	%	%	%
Schroder Balanced	D	BTA0247AU	(085)	%	%	%

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Investment Option	Asset Class*	OFFICE USE ONLY		Switch Curent Balance FROM the Investment Options* below	Switch Curent Balance TO the Investment Options* below	Future Investment Instructions* <i>You can select a maximum of 6 Options below</i>
		APIR Codes	Unit Code	% Balance	% Balance	% Contribution
Dynamic						
BT Australian Share	AS	BTA0029AU	(007)	%	%	%
BT Ethical Share	AS	BTA0253AU	(097)	%	%	%
BT Future Goals	D	BTA0068AU	(029)	%	%	%
BT Multi-manager Australian Share	AS	BTA0299AU	(104)	%	%	%
BT Multi-manager Growth	D	BTA0226AU	(043)	%	%	%
BT Partner Australian Shares Core 1	AS	BTA0095AU	(047)	%	%	%
BT Partner Australian Shares Growth 1	AS	BTA0096AU	(046)	%	%	%
BT Partner Australian Shares Value 1	AS	BTA0097AU	(048)	%	%	%
Alphinity Wholesale Concentrated Australian Share Fund	AS	BTA0303AU	(107)	%	%	%
Colonial First State Australian Share	AS	BTA0161AU	(028)	%	%	%
Aberdeen Classic Series Australian Small Companies	AS	BTA0255AU	(096)	%	%	%
Fidelity Australian Equities Fund	AS	BTA0305AU	(109)	%	%	%
ING Australian Shares	AS	BTA0164AU	(034)	%	%	%
Investors Mutual Australian Share	AS	BTA0099AU	(084)	%	%	%
MLC Growth	D	BTA0165AU	(031)	%	%	%
SSgA Australian Equities Index Trust	AS	BTA0307AU	(111)	%	%	%
Aggressive						
BT International Share	IS	BTA0033AU	(008)	%	%	%
BT Multi-manager High Growth	D	BTA0182AU	(039)	%	%	%
BT Multi-manager International Share	IS	BTA0302AU	(106)	%	%	%
BT Partner International Shares Core 1	IS	BTA0258AU	(094)	%	%	%
BT Partner International Shares Growth 1	IS	BTA0093AU	(044)	%	%	%
BT Partner International Shares Value 1	IS	BTA0094AU	(045)	%	%	%
Aberdeen Actively Hedged International Equities	IS	BTA0162AU	(025)	%	%	%
Ibbotson International Shares High Opportunities (Unhedged)	IS	BTA0256AU	(095)	%	%	%
SSgA International Equities Index Trust	IS	BTA0308AU	(112)	%	%	%
Templeton Global Equity	IS	BTA0309AU	(113)	%	%	%
Total Investment				%	100 %	100 %

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