



BT Lifetime – Personal Super
 BT Lifetime – Flexible Pension
 BT Classic Lifetime – Personal Super
 BT Classic Lifetime – Flexible Pension
 BT Retirement Selection – Personal Super Plan
 BT Superannuation Investment Fund
Advice Fee Cancellation

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

BT Funds Management Limited (Trustee) ABN 63 002 916 458, AFSL 233724, RSE L0001090 is the Trustee of:

- BT Lifetime (which includes BT Lifetime - Personal Super and BT Lifetime – Flexible Pension) ABN 83 953 436 008; and
- Retirement Wrap (which includes BT Retirement Selection – Personal Super Plan and BT Superannuation Investment Fund) ABN 39 827 542 991.

BT Funds Management No.2 Limited ABN 22 000 727 659, AFSL 233720, RSE L0001076 (Trustee) is the trustee of BT Classic Lifetime (which includes BT Classic Lifetime – Personal Super and BT Classic Lifetime – Flexible Pension) ABN 68 324 870 141.

For the purposes of this form, a product referred to above is called a 'BT account'.

Who can use this form?

This form can **only** be completed for members who have already set-up a monthly ongoing advice fee arrangement with their financial adviser on or after 14 December 2011 by completing an Advice Fee form (or Advice Fee section of their application form). If you have not previously set-up an ongoing advice fee for your BT account in this way, please contact your financial adviser to discuss your arrangement with them.

This form can be completed by either:

- You as the account holder (member) of the BT account; or
- your financial adviser associated with the monthly ongoing advice fee arrangement that is being cancelled (or a financial adviser authorised under the same Australian financial services licence (AFSL) as your financial adviser).

How to use this form

You, or your financial adviser associated with the monthly ongoing advice fee arrangement that is being cancelled (or a financial adviser authorised under the same AFSL):

- must complete sections 1 and 2 of this form; and
- must sign the declaration in either section 3A or 3B respectively.

A separate form must be used for the advice fee arrangement(s) under each different BT investor number, if you hold BT accounts under more than one BT investor number.

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

1. MEMBER DETAILS

BT Investor number

C

Title

Mr Mrs Miss Ms Other

Surname

Given name(s)

Date of birth (dd/mm/yyyy)

/ /

Daytime phone number

()

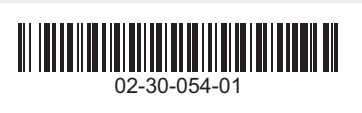
Mobile phone number

2. WHICH BT ACCOUNT(S) IS THIS REQUEST FOR?

Please tick which BT account you wish to cancel the ongoing advice fee from (tick applicable boxes below):

- BT Lifetime – Personal Super
- BT Lifetime – Flexible Pension
- BT Classic Lifetime – Personal Super
- BT Classic Lifetime – Flexible Pension
- BT Retirement Selection – Personal Super Plan
- BT Superannuation Investment Fund

If you have more one BT investor number, a separate form is required for each of your BT investor numbers.



3. DECLARATION AND SIGNATURE

This section must be completed and signed by either:

- The member specified in section 1 (complete section 3A); or
- The member's financial adviser (complete section 3B). The financial adviser must be either the financial adviser associated with the ongoing advice fee arrangement that is being cancelled; or a financial adviser authorised under the same AFSL.

3A MEMBER DECLARATION AND SIGNATURE

I declare and acknowledge that all information I have provided in this form is true and correct.

I understand that, by cancelling the ongoing advice fee in respect of the BT account(s) set out in section 2 above, the deduction of the monthly advice fee from my BT account(s) and payment of the advice fee to my financial adviser will cease from the date that this form is received by the Trustee.

Signature of Member

Date (dd/mm/yy)

3B FINANCIAL ADVISER DECLARATION AND SIGNATURE

BT Adviser number

A

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Phone number

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Fax number

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Mobile phone number

Office postcode

Email address

InvestmentLink ILCN (client no.)

ILGN group number

I declare and acknowledge that all information I have provided in this form is true and correct.


I understand that, by cancelling the ongoing advice fee arrangements in respect of the BT account(s) set out in section 2 above, the deduction of the monthly advice fee from the member's BT account(s) and payment of the advice fee to myself will cease from the date that this form is received by the Trustee.

Signature of Financial Adviser

Date (dd/mm/yy)

Financial adviser stamp (please use black ink only)

You can submit this form by:

-  mail BT Financial Group
GPO Box 2675,
Sydney NSW 2001