

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 RSE L0001090 is the trustee of BT Lifetime – Personal Super RSE R1003864 ABN 83 953 436 008.

The information collected on this form is governed by the BT Privacy Policy which is available on www.bt.com.au.

You can check or switch your current super balance over the internet at www.bt.com.au.

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

1 INVESTOR DETAILS

BT Investor number (if known)

C

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yy)

/ /

Postcode

2 PURPOSE OF THE FORM

To nominate new Investment Option(s) for your regular savings within the BT Regular Contribution Plan

➤ Complete Section 3 and sign Section 5.

To switch Investment Option within BT Super

➤ Complete Section 4 and sign Section 5.

3 CHANGING REGULAR CONTRIBUTIONS

Please complete the following if you wish to change the Investment Option for your regular savings plan or employer contributions (that is if you use the BT Regular Contribution Plan for personal or spouse contributions or employer deposit slip, direct debit or payroll deposit options). This will replace your existing allocation.

Note: For direct debits, requests must be received 7 business days before the 15th of the month to change the Investment Option allocation in that month.

Change relates to:

Personal

Employer direct debit

Spouse

Employer deposit slip/payroll

All

Investment Option		Contribution fee	Nil contribution fee	OR	
Stable	BT Cash	<input type="checkbox"/> BTA0601AU	<input type="checkbox"/> BTA0174AU	\$	%
Conservative	BT Conservative Outlook	<input type="checkbox"/> BTA0602AU	<input type="checkbox"/> BTA0139AU	\$	%
	BT Multi-manager Conservative	<input type="checkbox"/> BTA0232AU	<input type="checkbox"/> BTA0238AU	\$	%
	Macquarie Conservative	<input type="checkbox"/> BTA0198AU	<input type="checkbox"/> BTA0218AU	\$	%
	BT Australasian Bond	<input type="checkbox"/> BTA0018AU	<input type="checkbox"/> BTA0142AU	\$	%
	BT Global Bond	<input type="checkbox"/> BTA0020AU	<input type="checkbox"/> BTA0141AU	\$	%
Moderate	BT Multi-manager Balanced	<input type="checkbox"/> BTA0231AU	<input type="checkbox"/> BTA0237AU	\$	%
	BT Balanced Returns	<input type="checkbox"/> BTA0603AU	<input type="checkbox"/> BTA0140AU	\$	%
	BT Property Securities	<input type="checkbox"/> BTA0604AU	<input type="checkbox"/> BTA0145AU	\$	%
	BlackRock Balanced	<input type="checkbox"/> BTA0199AU	<input type="checkbox"/> BTA0219AU	\$	%
Dynamic	BT Multi-manager Growth	<input type="checkbox"/> BTA0230AU	<input type="checkbox"/> BTA0236AU	\$	%
	BT Australian Share	<input type="checkbox"/> BTA0019AU	<input type="checkbox"/> BTA0144AU	\$	%
	BT Future Goals	<input type="checkbox"/> BTA0065AU	<input type="checkbox"/> BTA0138AU	\$	%
	BT Partner Australian Shares Core 1	<input type="checkbox"/> BTA0081AU	<input type="checkbox"/> BTA0087AU	\$	%
	BT Partner Australian Shares Growth 1	<input type="checkbox"/> BTA0082AU	<input type="checkbox"/> BTA0088AU	\$	%
	BT Partner Australian Shares Value 1	<input type="checkbox"/> BTA0083AU	<input type="checkbox"/> BTA0089AU	\$	%
	MLC Growth	<input type="checkbox"/> BTA0200AU	<input type="checkbox"/> BTA0220AU	\$	%
	Colonial First State Australian Shares	<input type="checkbox"/> BTA0196AU	<input type="checkbox"/> BTA0216AU	\$	%

Investment Option		Contribution fee	Nil contribution fee	OR	
Aggressive	BT Multi-manager High Growth	<input type="checkbox"/> BTA0086AU	<input type="checkbox"/> BTA0092AU	\$	%
	BT Partner International Shares Growth 1	<input type="checkbox"/> BTA0084AU	<input type="checkbox"/> BTA0090AU	\$	%
	BT Partner International Shares Value 1	<input type="checkbox"/> BTA0085AU	<input type="checkbox"/> BTA0091AU	\$	%
	BT International Share	<input type="checkbox"/> BTA0027AU	<input type="checkbox"/> BTA0143AU	\$	%
	BT Technology	<input type="checkbox"/> BTA0146AU	<input type="checkbox"/> BTA0147AU	\$	%
	Aberdeen Actively Hedged International Equities	<input type="checkbox"/> BTA0197AU	<input type="checkbox"/> BTA0217AU	\$	%
TOTAL				\$	%

4 SWITCH

SWITCH FROM

Write in the space below the Investment Option(s) **from** which you would like to switch. Please specify whether the switch is from a contribution fee or nil contribution fee Investment Option and then choose either the full amount, partial dollar amount or the number of units you wish to switch. **The minimum switch per Investment Option is \$1,000.**

Please nominate each switch separately.

If you would like to enquire about your current balance, please contact Customer Relations on 132 135 and press 2 to speak to a superannuation specialist or visit BT Online at www.bt.com.au.

! Note: For BT Regular Contribution Plan if you have a regular savings plan and you make a full switch, BT Super will automatically transfer to the Investment Option to which you are switching.

SWITCH TO

Write in the space below the Investment Option(s) to which you would like to switch and the dollar amount or number of units to be switched to that Investment Option.

! Important: Please note that you cannot switch between the contribution fee and nil contribution fee options. If nominating a 'Switch from' amount in dollars, the 'Switch to' amount must be the same.

1 INVESTMENT OPTION

Is this a contribution fee or nil contribution fee option?

Contribution fee Nil contribution fee

Dollar amount/
Number of units
(Cross out which is not applicable)

Type of switch (select one)

Full Partial

1 INVESTMENT OPTION

Dollar amount/
Number of units
(Cross out which is not applicable)

2 INVESTMENT OPTION

Is this a contribution fee or nil contribution fee option?

Contribution fee Nil contribution fee

Dollar amount/
Number of units
(Cross out which is not applicable)

Type of switch (select one)

Full Partial

2 INVESTMENT OPTION

Dollar amount/
Number of units
(Cross out which is not applicable)

3 INVESTMENT OPTION

Is this a contribution fee or nil contribution fee option?

Contribution fee Nil contribution fee

Dollar amount/
Number of units
(Cross out which is not applicable)

Type of switch (select one)

Full Partial

3 INVESTMENT OPTION

Dollar amount/
Number of units
(Cross out which is not applicable)

TOTAL

TOTAL



5 DECLARATION

If I have elected to switch Investment Options or change my Regular Contribution Plan I understand that the transaction will be made under the current terms and conditions of the BT Lifetime – Personal Super Trust Deed and Product Disclosure Statement.

Signature of **Investor**

Date

You can submit this form by:

-  mail BT Lifetime – Personal Super
GPO Box 2675
Sydney NSW 2001
-  fax (02) 9274 5780

Adviser stamp (please use black ink only)

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