



BT Margin Lending Authorised Representative Form

Use this form to nominate additional people to operate your BT Margin Loan Facility on your behalf. With the exception of receiving a margin call (which will be directed to the Margin Call Contact), an authorised representative can do anything you are able to do under your BT Margin Loan Facility (including but not limited to increasing the loan, buying and selling investments and changing your contact details). You may provide us with a written request to terminate this appointment at any time. Your authorised representative must be an Australian resident for tax purposes.

FORM INSTRUCTIONS

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

The **original** of this form and any other required information must be sent to:

✉ mail BT Margin Lending
GPO Box 3917
Sydney NSW 2001

☎ fax **This form cannot be faxed**

QUESTIONS?

If you have any questions regarding completing this form, and:

You are the borrower:

- call BT Customer Relations Consultants on 1800 816 222, or
- email us at client.marginlending@btfinancialgroup.com

You are the nominated financial adviser:

- Please call BT Adviser Relations on 1800 671 409, or
- Email us at adviser.marginlending@btfinancialgroup.com

Phone lines are available Mon–Fri from 8.00am to 6.30pm (Sydney time).

BORROWER'S DETAILS

Borrower's name(s)

Borrower's client code

A. DETAILS OF AUTHORISED REPRESENTATIVE

Title

Mr Mrs Miss Ms Other

Given name(s) (include first and middle names)

Surname

Date of birth (dd/mm/yyyy)

Drivers licence number

State of issue

Home phone number

Mobile phone number

Work phone number

Fax number

Email address*

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

Current residential address (PO Box is not acceptable)

State

Postcode

Relationship to the borrower(s)

Are you an existing Westpac customer?

Yes No

If **Yes**, select and complete ONE of the following forms of identification. Note that the name of the account identification must be the same name you have provided above.

Westpac account details

BSB number

Account number

Account holders name(s)

OR Westpac customer number

If **No**, to meet our obligations under the Anti-Money Laundering and Counter-Terrorism Financing Act 2006, we must identify customers before we provide a service. Refer to the Proof of Identification form, for a list of acceptable documentation and eligible certifiers.

B. SIGNING SECTION

By signing this form, I/we agree that:

- BT Margin Lending is authorised to provide any information in relation to my/our BT Margin Loan Facility to the authorised representative/s and can assume that each authorised representative/s has the authority to operate the loan independently.
- BT Margin Lending may verify instructions received from the authorised representative/s but is not obliged to do so.
- I/we will ratify any action taken by the authorised representative/s in accordance with this authority.
- The nominated authorised representative confirms that they are an Australian resident for tax purposes.

For company or company trustee borrowers, either two directors, or one director and the secretary OR the sole director and the secretary must sign. Indicate your company capacity by marking the appropriate box below your signature.

Signature of **Authorised Representative**

Full name of **Authorised Representative** *(please print)*

Signature of **Borrower 1**

Full name of Borrower 1 *(please print)*

Director Sole Director and Secretary

Signature of **Borrower 2**

Full name of Borrower 2 *(please print)*

Director Company Secretary

Date (dd/mm/yy)