BT Margin Lending

Margin Lending_Online switch form

BT Financial Group

Use this form to switch your existing BT Margin Lending_Online loan facility to a standard BT Margin Lending Standard Margin Loan.

Please complete the form using a BLACK PEN, print in CAPITAL LETTERS and mark answer boxes with a [X]

Questions?

If you are a direct investor:
- call our BT Customer Relations on 1800 816 222
- email us at client.marginlending@btfinancialgroup.com.

If you are a financial adviser:
- call BT Adviser Relations on 1800 671 409
- email us at adviser.marginlending@btfinancialgroup.com.

Phone lines are available Monday to Friday from 8.00am to 6.30pm (Sydney Time).

1. DETAILS

To BT Securities Limited ACN 000 720 114
BT (Queensland) Pty Limited 009 818 875
(individually and together, BT Margin Lending)

From (full name of borrower)

of (please insert your current address OR registered address for a company borrower)

STATE

POSTCODE

Borrower's client code –

ACN/ABN (if applicable) – – –

I/We request BT Margin Lending to switch my/our BT Margin Lending_Online loan facility opened under the above loan account to a BT Margin Lending Standard BT Margin Loan.

I/We also undertake and acknowledge to BT Margin Lending as follows:

(a) BT Margin Lending will apply the standard variable or fixed interest rate to my/our standard margin loan, as applicable and

(b) I/We understand that I/we cannot request my/our standard margin loan to be switch to a BT Margin Lending_Online loan and BT Margin Lending has the sole discretion to decide whether my/our standard margin loan can be switched to a BT Margin Lending_Online loan.

2. SIGNING SECTION

For Company or Company Trustee Borrowers, either two Directors, or one Director and the Secretary or the Sole Director and Secretary must sign. Please indicate your company capacity by marking the appropriate box below your signature. Company or Company Trustee borrowers do not need to have the signatures witnessed in this Section.

▶ Signature of Borrower

DATE (DD – MM – YY)

Please print full name

☐ Sole Director and Secretary ☐ Company Director

▶ Signature of Additional Borrower

DATE (DD – MM – YY)

Please print full name

☐ Company Director ☐ Company Secretary

▶ Signature of Third Party Security Provider

DATE (DD – MM – YY)

Please print full name

☐ Sole Director and Secretary ☐ Company Director

▶ Signature of Additional Third Party Security Provider

DATE (DD – MM – YY)

Please print full name

☐ Company Director ☐ Company Secretary

Please send your completed Margin Lending_Online switch form to:

BT Margin Lending
GPO Box 3917
Sydney NSW 2001

This form can also be faxed to (02) 9274 5782.

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