BT Margin Lending_Online
Conversion Form

BT Financial Group

Use this form to:
- convert your existing BT Margin Loan to a BT Margin Lending_Online facility through Westpac Securities
- link your Westpac Online Investing account to your BT Margin Lending_Online facility.

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

Questions? Please call our BT Customer Relations on 1800 816 222, or email us at client.marginlending@btfinancialgroup.com . Phone lines are available Monday to Friday from 8.00am to 6.30pm (AEST)

Borrower's Client Code - Title Given name(s)

Surname

Residential address

STATE POST CODE

Mailing address

STATE POST CODE

Daytime contact number
Please include the area code. ( )

Fax number
Please include the area code. ( )

Email address

2. LODGEMENT INSTRUCTIONS

☐ I authorise the Participant to transfer all of my broker sponsored shares and HIN to BT Margin Lending

Westpac Securities Account Number

3.SIGNING SECTION

- I/We have read and understood the attached BT Margin Lending_Online Loan Terms and Conditions.
- I/We understand that my/our existing BT Margin Loan is being converted to a BT Margin Lending_Online facility which is to be linked to my Westpac Online Investing account.
- I/We acknowledge that Westpac Securities and the Participant's Privacy Policies apply to the personal information collected on this form.
- I/We acknowledge that my/our existing direct debit request (DDR) for my Westpac Online Investing account will remain in place for the purpose of debiting for any additional Westpac Securities ancillary services.
- I/We acknowledge that the above terms and conditions are additional terms relating to the use of my/our BT Margin Loan via Westpac Online Investing account and all the terms and conditions of the loan agreement signed with BT Margin Lending remain valid.

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

Please send your completed BT Margin Lending_Online conversion form to:

BT Margin Lending
GPO Box 3917
Sydney NSW 2001

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

Online Investing through Westpac Securities Limited ABN 39 087 924 221 AFSL 233723 is a service provided by the Australian Investment Exchange Limited ABN 71 076 515 930 AFSL 241400, a Participant of the ASX Group.