BT Financial Group

BT Retirement Selection – Personal Super RSE R1003994
BT Lifetime – Personal Super RSE R1003864
BT Superannuation Savings Fund RSE R1003963
BT Classic Lifetime – Personal Super RSE R1003925
BT Superannuation Investment Fund RSE R10003956
Eligibility to Contribute Form

Form issued 1 July 2007

Purpose of this form is to:

- confirm your eligibility to contribute.

*Complete this form using **black pen** – print in clear **CAPITAL LETTERS.** Use crosses [✘] in boxes where applicable*

The Trustee of BT Lifetime Personal Super and BT Retirement Selection – Personal Super is BT Funds Management Limited ABN 63 002 916 458, AFSL 233724, RSE L0001090. The Trustee of BT Classic Lifetime – Personal Super is BT Funds Management Limited No.2 ABN 22 000 727 659, AFSL 233720, RSE L0001076. The Trustee of BT Superannuation Investment Fund and BT Superannuation Savings Fund is Westpac Securities Administration Limited ABN 77 000 049 472, AFSL 233731, RSE L0001083.

1 INVESTOR DETAILS

Investor number

C

Title

Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other

Birth date

D D / M M / Y Y Y Y

Given name(s)

Surname

Address

Postcode

Country, if not Australia

Daytime phone number ( )

Mobile phone number ( )

Email address *

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

2 ELIGIBILITY TO CONTRIBUTE

Please select your age and the criteria under which your contributions will be made, select all that apply.

☐ I am under age **65**

I am aged **65 – 74**

☐ with mandated employer contributions being made on my behalf (Superannuation Guarantee contributions only to age 70)

☐ with contributions other than mandated employer contributions being made by me or on my behalf and I have been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year (spouse contributions only to age 70)

I am aged **75 or more**

☐ with mandated employer contributions (other than Superannuation Guarantee contributions) being made on my behalf

3 SIGNATURE

Signature of **Investor**

Date / /

If we do not receive your confirmation

If we do not receive confirmation of your status within 28 days we are unable to accept your contribution into your super fund. If this occurs, we will send you (or the contributing party) a cheque for your contribution amount.

Mail to

BT Financial Group
GPO Box 2675
Sydney NSW 2001

Fax to

02 9274 5780