



BT Lifetime Super – Employer Plan Business Partner and Sole Trader Application

BT Contact Centre 1300 553 010 (8.00am – 6.30pm Mon – Fri Sydney time)

BT Funds Management Limited ABN 63 002 916 458 AFSL 233724 RSE L0001090 is the Trustee of BT Lifetime Super – Employer Plan ABN 39 827 542 991 RSE R1001327

You must read the BT Lifetime Super – Employer Plan (BT Super) Product Disclosure Statement (PDS) in full before making an investment decision and completing this application form.

If you do not have a copy of the BT Super PDS, please contact the BT Contact Centre on 132 135 or download a copy from our website at www.bt.com.au.

This application form is for Business Partners and Sole Traders (who are actively working in the Business for more than 10 hours per week) who wish to join a new or existing plan in BT Super.

If you are a Business Partner or Sole Trader establishing a new BT Super plan, please also complete an Employer Application form from the BT Super Employer Brochure.

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

This application is for a: Business Partner Sole Trader

1. EXISTING PLAN DETAILS

BT Employer number (if known)

BT Employer name

2. PERSONAL DETAILS

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Gender

Male Female

Postal address

State Postcode

Residential address – if different from above

State Postcode

Daytime phone number

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Mobile phone number

Email address*

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

3. TAX FILE NUMBER

Tax file number (TFN)

We are authorised to collect your TFN under the Superannuation Industry (Supervision) Act 1993 (SIS).

It is not an offence if you do not quote your TFN. However, giving your TFN will have the following advantages, which may not otherwise apply:

- we will be able to accept all types of contributions to your account(s)
- you will not be subject to extra tax for making contributions without a TFN
- other than the tax that might ordinarily apply, no additional tax will be deducted when you start drawing down on your superannuation benefits
- it will be much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

These advantages may change in the future.

If provided, your TFN will be used for legal purposes only, including providing it to another super fund, unless you notify us otherwise in writing, in which case it will be kept confidential. These purposes may change in the future if the law changes.

4. EMPLOYMENT DETAILS

Date joined company (dd/mm/yyyy)

/ /

Employee Category¹ (eg Employee category 1 or 2 or Casual)

Annual Income²

\$

Employment Status (if applicable)

Full time Casual Permanent Part-time

Hours per week³ (actively working in this business)

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Occupational classification number⁴

¹ Please indicate the Employee category that this Business Partner or Sole Trader will belong to in the plan. For existing plans, please refer to the business owner/your plan details for further information on the Employee Categories

² Please refer to the 'Definitions and interpretations of insurance terms' Section of the BT Super Additional Information Booklet for the definition of 'Income'

³ Salary Continuance Insurance cover is only available if you are a permanent employee and work 15 hours or more per week

⁴ Please refer to the occupation classifications in the Additional Information Booklet.



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5. INITIAL CONTRIBUTION DETAILS

Note: Cash is not accepted. If the BT Online Employer option is selected, your initial contribution must be submitted online as a Member Voluntary contribution.

How will initial contributions be made?		Cheque	BT Online Employer
Member contributions	\$	<input type="checkbox"/>	<input type="checkbox"/>
Employer contributions	\$	<input type="checkbox"/>	<input type="checkbox"/>
Spouse contributions	\$		
Contributions relating to small business concessions	\$	▶ attach ATO election form ¹	
Directed termination payments	\$	▶ attach employer documentation ²	
Contributions from certain personal injury settlements or orders	\$	▶ attach ATO election form ³	
ATO Super Guarantee Voucher	\$		
Rollovers from other superannuation funds	\$		
How many? ▶	<input type="text"/>		

Rollover Details⁴

Name of rollover institution	Estimated amount
	\$
	\$
	\$
	\$
	\$

¹ ATO Capital gains tax cap election

² Directed termination payment statement

³ ATO Contributions for personal injury

⁴ If you are rolling over funds and you have not already initiated the transaction, for each rollover please complete a Request to Transfer form available online at www.bt.com.au.

6. INVESTMENT STRATEGY

Your money will be invested in the employer Default Investment Option applicable to your plan (or if none selected, the Trustee default investment option, currently the BT Multi-manager Balanced Investment Option) *unless you nominate otherwise below.*
(A maximum of 6 Investment Options may be selected.)

Risk Category	Investment Option	Asset Class*	OFFICE USE ONLY		% Contribution <i>You can select a maximum of 6 Investment Options. Indicate the % for each below.</i>
			APIR Codes	Unit Code	
Stable	BT Cash	C	BTA0511AU	(003)	%
Conservative	BT Multi-manager Conservative	D	BTA0225AU	(041)	%
	BT Conservative Outlook	D	BTA0512AU	(002)	%
	Macquarie Conservative	D	BTA0163AU	(027)	%
	BT Multi-manager Fixed Interest	F	BTA0300AU	(105)	%
	BT Australasian Bond	F	BTA0028AU	(009)	%
	BT Global Bond	F	BTA0030AU	(010)	%
	Macquarie Diversified Fixed Interest	F	BTA0257AU	(092)	%
Moderate	BT Multi-manager Balanced	D	BTA0224AU	(042)	%
	BT Balanced Returns	D	BTA0513AU	(201)	%
	Westpac Balanced	D	BTA0098AU	(049)	%
	BlackRock Scientific Diversified Growth	D	BTA0160AU	(032)	%
	Schroder Balanced	D	BTA0247AU	(085)	%
	Vanguard Growth Index Fund	D	BTA0399AU	(114)	%

Risk Category	Investment Option	Asset Class*	OFFICE USE ONLY		% Contribution <i>You can select a maximum of 6 Investment Options. Indicate the % for each below.</i>
			APIR Codes	Unit Code	
Dynamic	BT Multi-manager Growth	D	BTA0226AU	(043)	%
	BT Future Goals	D	BTA0068AU	(029)	%
	MLC Growth	D	BTA0165AU	(031)	%
	BT Property Securities	P	BTA0034AU	(011)	%
	BT Global Property	P	BTA0254AU	(093)	%
	AMP Capital Investors Listed Property	P	BTA0159AU	(035)	%
	BT Multi-manager Australian Share	AS	BTA0299AU	(104)	%
	BT Australian Share	AS	BTA0029AU	(007)	%
	BT Ethical Share	AS	BTA0253AU	(097)	%
	BT Partner Australian Shares Core 1	AS	BTA0095AU	(047)	%
	BT Partner Australian Shares Growth 1	AS	BTA0096AU	(046)	%
	BT Partner Australian Shares Value 1	AS	BTA0097AU	(048)	%
	Aberdeen Classic Series Australian Small Companies	AS	BTA0255AU	(096)	%
	Colonial First State Australian Share	AS	BTA0161AU	(028)	%
	Fidelity Australian Equities Fund	AS	BTA0305AU	(109)	%
	ING Australian Shares	AS	BTA0164AU	(034)	%
	Investors Mutual Australian Share	AS	BTA0099AU	(084)	%
	Vanguard Index Australian Shares Fund	AS	BTA0408AU	(119)	%
	Aggressive	BT Multi-manager High Growth	D	BTA0182AU	(039)
Colonial First State Wholesale Geared Share Fund		AS	BTA0405AU	(117)	%
BT Multi-manager International Share		IS	BTA0302AU	(106)	%
BT International Share		IS	BTA0033AU	(008)	%
BT Partner International Shares Core 1		IS	BTA0258AU	(094)	%
BT Partner International Shares Growth 1		IS	BTA0093AU	(044)	%
BT Partner International Shares Value 1		IS	BTA0094AU	(045)	%
Aberdeen Actively Hedged International Equities		IS	BTA0162AU	(025)	%
Aberdeen Emerging Opportunities Fund		IS	BTA0404AU	(116)	%
Colonial First State Wholesale Global Resources Fund		IS	BTA0406AU	(118)	%
Platinum international fund		IS	BTA0400AU	(115)	%
Vanguard Index International Shares Fund		IS	BTA0407AU	(120)	%
Total Investment					100 %

*Asset Class: D – Diversified, IS – International Shares, AS – Australian Shares, P – Property, F – Fixed Interest, C – Cash

7. SIGNATURE AND DECLARATIONS

Before you sign this Business Partner and Sole Trader Application form, the Trustee is obliged to give you a copy of the BT Super PDS. This will help you understand the product and decide whether it is appropriate to your needs.

In signing this application I acknowledge that

- I have received, read and understood the PDS
- I agree to, consent to and acknowledge the declarations, conditions and acknowledgements provided throughout the PDS and declare that all given details in this application are true and correct.

I understand that:

- an investment in BT Lifetime Super – Employer Plan is not a deposit with or any other liability of Westpac Banking Corporation ABN 33 007 457 141 or any other company in the Westpac Group of companies
- an investment in BT Lifetime Super – Employer Plan is subject to investment risk, including possible delays in repayment or loss of income and principal invested
- none of the Westpac Banking Corporation or its related entities stand behind or otherwise guarantee the capital value or investment performance of any Investment Option offered in the PDS.

Where this application form has been downloaded from an electronic file:



- you acknowledge that, prior to making this application, you personally received the electronic PDS or a printout of it, attached to or accompanying this application form
- you understand that the law prohibits any person passing this application form to another person unless it is attached to, or accompanied by, the complete and unaltered PDS
- the Trustee will send to you, upon request and free of charge, the paper version or the electronic PDS that accompanies this application form, during the life of the PDS.

Signature of **Business Partner/Sole Trader**

Date (dd/mm/yy)

Signatory's name *(please print)*

You can submit this form by:

-  mail BT Lifetime Super – Employer Plan
GPO Box 2919, Adelaide SA 5001
-  fax (02) 9274 5402