

# Dealer group registration



## Use this form to:

Register as a dealer group to recommend offers and services available through the Panorama internet service.

You can type directly into the form and print before signing, or print then complete in block letters. Each section of the form must be completed for the update to be processed.

## Important information

BT Portfolio Services Ltd ABN 73 095 055 208 ('BTPS') must sight a copy of the Australian Financial Services Licence (AFSL) of the person or entity ('Licensee') on whose behalf you are authorised to recommend the offers and services available through the Panorama internet service.

### Dealer group hierarchy

You will have the ability to set up a "practice(s)" under the dealer group allowing you to segregate your business (e.g. state or business unit) and link specific advisers to a practice. This is for your administrative purposes only. The relationship between the adviser and their clients will remain unchanged and the adviser will remain associated with your dealer group.

### Dealer group authorised person

A dealer group authorised person will have authority to give instructions and sign Panorama forms on behalf of the dealer group. There are two types of authorisations – a practice level and dealer group level authorisation.

- Practice level authority is limited to providing instructions on behalf on the dealer group in relation to a particular practice (such as transferring clients between advisers, appointing and removing staff access).
- Dealer group level authority is responsible for all aspects of the dealer group including but not limited to amending your dealer group's bank account details, and adding or removing dealer group authorised person(s).

### Adviser and support staff

For your advisers and support staff to gain access to the Panorama offers and services, the 'Adviser access' and 'Support staff access' forms will need to be completed. These will also need to be completed for existing staff to be linked to a new practice.

## Terms and conditions

In signing this form, you are bound by the '[Panorama dealer group terms and conditions](#)'. These have been provided to you at the same time as this application and can be accessed via the above hyperlink or [bt.com.au/panorama](http://bt.com.au/panorama).

## 1 Dealer group information

**Dealer group name** (AFSL holder)

**Australian Business Number (ABN) of the Licensee**

**AFSL number** (please attach a copy of the AFSL)

**Business Development Manager name**

## 2 Practice information

(Applicable if setting up a practice)

**Do you wish to set up practice(s)?**

No

Yes, please complete details below

### Practice 1

**Practice name**

**Australian Business number** (if applicable)



## Dealer group registration

### Practice 2

Practice name

Australian Business number (if applicable)

### Practice 3

Practice name

Australian Business number (if applicable)

If there are more practices, provide details on a separate page and check this box

## 3 Dealer group authorised person

See 'important information' for details about the dealer group authorised person.

### Dealer group authorised person 1

What level are you authorising this person?

	Dealer group	Practice			
<b>Title</b>	Mr	Mrs	Ms	Miss	Dr
<b>First name</b>					
<b>Last name</b>					
<b>Gender</b>	Male	Female			

Date of birth (dd/mm/yyyy)

### Business address

Address

Suburb State Postcode

### Postal address

Same as business address

Address

Suburb State Postcode

**Note** A mobile number is required to finalise your Panorama online access. Incomplete details may result in a delay.

Mobile

Email address

Other contact number (e.g. work phone)

### Preferred contact method

Mobile Email address Other contact number

### Panorama online access

Do you wish for the authorised person 1 to also be set up with 'Manager access'?

No online access required Read only access Update access<sup>1</sup>

<sup>1</sup> User can perform user access validation and if applicable, manage tailored portfolios.

### Dealer group authorised person 1

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Authorised person 1 signature

Date (dd/mm/yyyy)

### Dealer group authorised person 2

What level are you authorising this person?

Dealer group Practice

Title

Mr Mrs Ms Miss Dr



## Dealer group registration

First name

Last name

Gender

Male Female

Date of birth (dd/mm/yyyy)

**Business address**

Address (Cannot be a PO Box)

Suburb

State

Postcode

**Postal address**

Same as business address

Address

Suburb

State

Postcode

**Note** A mobile number is required to finalise your Panorama online access. Incomplete details may result in a delay.

Mobile

Email address

Other contact number (e.g. work phone)

**Preferred contact method**

Mobile Email address Other contact number

### Panorama online access

Do you wish for the authorised person 2 to also be set up with 'Manager access'?

No online access required Read only access Update access<sup>1</sup>

<sup>1</sup> User can perform user access validation and, if applicable, manage tailored portfolios.

### Dealer group authorised person 2

In signing this form, you are bound by the '[Panorama dealer group terms and conditions](#)'. These have been provided to you at the same time as this application and can be accessed via [bt.com.au/panorama](http://bt.com.au/panorama)

**Authorised person 2 signature**

Date (dd/mm/yyyy)

## 4

### Dealer group bank account details

Fees will be paid into the following account:

**Account holder name**

**Name of financial institution**

**BSB**

**Account number**

## 5

### Financial planning software

Select the financial planning software you would like us to send the client account data to:

AdviserNETgain BGL  
COIN XPLAN

## 6

### BT Protection Plans

**Would you like to register for BT Protection Plans?**

Yes No Already registered

**Provide the dealer group AFSL number and attach a copy of the AFSL to register with BT Protection Plans.**



## Dealer group registration

### 7 Challenger Annuity Products via Panorama

Would you like to register for Challenger Annuity Products via Panorama?

Yes<sup>1</sup>      No

<sup>1</sup>Your dealer group and adviser's personal information will be shared with challenger.

### 8 Declaration & acknowledgements

I declare I have fully read this form and the information completed is true and correct. By signing this form, I agree to the following terms and conditions:

- The adviser/s that will be registered under this dealer group are either:
  - An Authorised Representative under section 916A of the Corporations Act 2001 (Cth) of the Licensee and under that authorisation is authorised to recommend Panorama Investment offers and services as set out in the 'Panorama dealer group terms and conditions'; or
  - An employee or director of the Licensee or of another entity specified in section 911B(1)(a) of the Corporations Act 2001 (Cth) that is authorised to recommend Panorama Investment offers and services as set out in the 'Panorama dealer group terms and conditions'; or
  - Authorised under section 916B(3) of the Corporations Act 2001 (Cth) by a corporate representative of the Licensee and under authorisation is authorised to recommend Panorama Investment offers and services as set out in the 'Panorama dealer group terms and conditions'.
- You have agreed to recommend the Panorama investment offers and services as set out in the 'Panorama dealer group terms and conditions'.
- You have agreed to be bound by the terms and conditions set out in the '[Panorama dealer group terms and conditions](#)'. These can be accessed via [bt.com.au/panorama](http://bt.com.au/panorama) and have previously been provided by your Business Development manager.
- All users that are registered under your dealer group level access (including if they are linked to a practice linked under your dealer group) will be assumed to have been approved by you to use Panorama and the obligations imposed on you under this agreement will be extended to the actions of your authorised representatives and nominated users and you will be bound by the terms and conditions of the Adviser access form that they sign.

#### Dealer group signature

In the case of company signatories, **two directors or a director and a company secretary must sign** unless the company has a sole director and sole secretary. Company signatories must also indicate their company title.

Full name

Signature

Date (dd/mm/yyyy)

Director

Company secretary

Other (specify below)

#### Secondary signature

Full name

Signature

Date (dd/mm/yyyy)

Director

Company secretary

Other (specify below)

Company signatories must indicate their company title.

#### You can submit this form by:



**email:** [dealergroupregistration@panorama.com.au](mailto:dealergroupregistration@panorama.com.au)  
(and cc your Business Development Manager)  
**mail:** Panorama, GPO Box 2861, Adelaide SA 5001

