

The move to BT Panorama was successful



Your clients' accounts are now on BT Panorama

Important
information

We're pleased to share that the move to BT Panorama was completed over the weekend.

Thank you for your support during this transition. To make the most of BT Panorama, we recommend you:

- **Review the welcome pack** your clients will receive from Wednesday by email, or by post soon after. If your clients need access to their account before their welcome pack arrives, they can contact us and we'll help them.
- **Log in and check your clients' accounts** and reach out if you notice anything unexpected – we're here to help.

This is a significant milestone, and we're looking forward to working with you to unlock the benefits of BT Panorama.

[Important updates and actions you may need to take](#)

This section includes important reminders and updates to help you and your team support your client conversations.

[Read the client welcome pack](#)

We recommend reviewing the client welcome pack. It includes:

- A **communication** with details on how to register for online account access, and key steps to set up the account and payments.
- A **New to BT Panorama** flyer including how to navigate BT Panorama, common tasks and helpful tips.
- For super accounts a '[Choice of super fund](#)' form, making it simple to update fund details including the USI to BT Panorama Super with their employer.
- For joint/company accounts an '[Account set up and permissions for migrated accounts](#)' form to allow each signatory to operate individually.
- Details of online help and support resources.

Examples of these communications and resources can be found on the [migration hub](#).

Be aware we may communicate to clients if there is a delay accessing their account

Now the move from Asgard to BT Panorama has occurred, some accounts may need additional attention to complete the move, which may delay access.

If any of your clients are affected, we'll contact you first, ahead of reaching out to them.

Help your clients verify their identity

Some clients will need to verify their identity on BT Panorama. This is part of our strengthened security measures and compliance with the *Anti-Money Laundering and Counter-Terrorism Financing Act 2006*.

To find a list of your clients' accounts that need to be verified, please log into BT Panorama, select **Tracking** then **Client ID & KYC reviews**.

Be across the key features and differences between Asgard and BT Panorama

For a summary of the key features and differences between Asgard and BT Panorama, visit *The Move to BT Panorama Guides*, section 'From Asgard to BT Panorama' available on the [migration hub](#).

Ensure your clients have the minimum cash balance

The minimum cash balance requirements on BT Panorama are:

- \$4,000 for Pension accounts (including Transition to Retirement Pension)
- \$2,000 for Investments and Super accounts

Please remind your clients that, to help them meet payments and maintain the minimum required balance, their investments will be sold down in line with their drawdown strategy once the cash balance falls \$500 below the minimum.

Be aware some clients' regular pension payments have been adjusted

Reminder

On BT Panorama, your client's nominated regular pension payments must meet the annual minimum through regular payments rather than with an end of financial year lump sum payment. Changes have been made to over 4,000 pension clients where their nominated regular payment amount on Asgard didn't meet the annual minimum.

This means any affected clients will now receive a larger payment in their regular pension payments for the remainder of this financial year. Starting in the next financial year their regular pension payments will be adjusted, in line with their frequency over the year to meet the annual minimum.

To check your client's pension payment details, please log into BT Panorama, select the Pension account from the Overview screen then **Pension payments**.

[Check the timing of insurance premium deductions – Super only](#)

Reminder

Clients need to ensure they have sufficient cash in their Transaction Account to cover their insurance premium deductions to maintain their insurance cover otherwise a drawdown will be triggered. If your clients have insurance cover through another super account and request regular rollovers from their Asgard Super account to cover insurance premiums, all future rollover requests need to use the BT Panorama Super USI 90 194 410 365 011 and their new account number.

Clients who have an insurance policy linked to their account may notice a temporary delay to their premiums being deducted.

If your clients pay insurance premiums quarterly, half-yearly or yearly and their premium was due in March, this premium will be deducted in April.

[Set up data downloads on BT Panorama](#)

Reminder

BT Panorama provides data feeds at three levels - Dealer group, Adviser and Account. If you're already receiving data feeds from BT Panorama, please

check your setup on Panorama and, where required, update your existing subscriptions.

If you're new to BT Panorama and not receiving data feeds, you will need to set up subscriptions for your financial planning software. Visit the [migration hub](#) for step-by-step instructions.

AdviserNET Closed account information

AdviserNET will remain available for the next 12 months, so you can still view details of your clients' closed Asgard accounts via the Closed accounts screen. You'll receive Account Action emails in the coming days confirming the value of your clients' managed funds, shares and cash moved to BT Panorama.

We're here to support you

Our priority is to support you to confidently guide your clients as they adopt BT Panorama's online tools to make tasks and information simple and accessible.

If you need help:

- Visit the [migration hub](#) for the latest updates, step-by-step guides, support tools and answers to frequently asked questions.
- Contact your **Business Development Manager** or our **BT Panorama team** on [1300 784 207](tel:1300784207), Monday to Friday, 8.30am – 6.30pm (AEDT).

Thank you

Thank you for your ongoing support and the way you've helped your clients prepare for this change.

Yours sincerely,



Annabelle Kline
Chief Product Officer

Important information

This information is current at 23 March 2026.

This information has been prepared for use by financial practice professionals only, it provides an overview or summary only and it should not be considered a comprehensive statement on any matter or relied upon as such. This information does not take into account your clients' personal objectives, financial situation or needs and so you and your clients should consider its appropriateness, having regard to these factors before acting on it.

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