

SAMPLE SIGNIFICANT EVENT NOTICE - For use by financial advisers only.  
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# Asgard

**Email subject line:** The late member's account is moving to BT Panorama in March 2026

**Email banner:** Moving to BT Panorama in March 2026

**Important information: The late member's account is moving to BT Panorama in March 2026**

To the Authorised Representative for <salutation member's name>,

We understand that managing a deceased estate can be a deeply personal and often complex responsibility. We're writing to inform you of an upcoming change that will affect the late <salutation member's name>'s account, and to help you prepare for any implications this may have on the estate's administration process.

On **21 March 2026**, the late member's account will move from their current product, <ASGARD product> to **BT Panorama Super**<sup>1</sup>, if the account is not closed beforehand.

Please read this notice, as well as the **Moving to BT Panorama guide**, **fee schedule** and **fee comparison flyer**, as these contain information about the changes to the account. Please note, these documents are written for members but include key details about the transfer of the deceased member's account. Some parts may not apply to your situation.

We understand there's a lot to take in - if you need help, speak with the estate's financial adviser, if there is one, or contact us - we're here to support you.

### What you need to do

#### Provide requirements to finalise the death benefit payment

To avoid delays in finalising the death benefit payment:

- Please provide all outstanding information or documents which are needed for us to finalise distribution of the benefit and close the account.
- If the information and documents are unable to be provided by **2 March 2026** or if we're otherwise unable to finalise the estate the account will move to BT Panorama, until the estate can be finalised.

Where outstanding requirements have not been provided prior to the move, your claim will continue to be managed by your Case Manager on BT Panorama.

#### Freeze period

When the account is moved from Asgard to BT Panorama, it will be moved to a new technology platform. When accounts are moved on a large scale, from one technology platform to another, it's normal to have a period where changes to accounts are temporarily paused. This is called a **freeze period**. During the freeze period we'll be unable to process any transactions or make changes to the Asgard account.

The freeze period will run from 2 to 22 March 2026 and may affect any planned changes on the

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<sup>1</sup> BT Panorama Super includes super, transition to retirement, pension and term allocated pension accounts.

account. For more information, please see the guide – page 10.

### **How we'll deduct fees during the month the account moves to BT Panorama**

During March 2026, the month the account will be moved to BT Panorama, administration fees will be calculated and deducted in two parts: from the Asgard account for the period leading up to the move, and from the BT Panorama account for the period after the move.

From April 2026, administration fees will continue to be deducted from the BT Panorama account monthly.

There will also be a change to the way we calculate the Asgard fee for March. For more information, please see the guide – page 8.

### **What happens next**

In the days following the move, we'll send you a letter with details to confirm the account has moved.

If there are any changes to the planned move, we'll let you know.

Visit **our migration hub** - [bt.com.au/movingyouraccount](https://bt.com.au/movingyouraccount) to learn more about BT Panorama, find updates, step-by-step guides and search for answers to frequently asked questions.

### **We're here to help**

If you have further questions, please talk to the estate's financial adviser (if they have one), or contact your Estate and Claims Case Manager on 1300 883 246 from Monday to Friday, 9am to 5pm Sydney time.

Yours sincerely,

Annabelle Kline

Chief Product Officer

### **Important information**

Information current as at 12 January 2026.

Please be aware we will never ask you for your login information. To find tips to protect yourself and avoid scams and viruses visit [westpac.com.au/security](https://westpac.com.au/security)

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