

**Client Services contact details****Phone:**

Within Australia: (02) 8456 0230

New Zealand: 0800 894 131

Email enquiries:

btfunds@unitregistry.com.au

Change of Name Form

Use this form if you are an existing investor and wish to change your name. Do not use this form if you wish to transfer your investment to someone else.

Please complete all sections in BLOCK letters and using a black pen. If you make an error while completing this form, do not use correction fluid, cross out your mistake and initial your changes.

HOW TO COMPLETE THIS FORM

Step 1 Ensure that you have completed the following:

- your account number and account name as it appears on your latest statement in **section 1**
 - your 'Existing Details' in **section 2**
 - your 'Name Change Instructions' in **section 3**
 - signed the form as per the 'Signing Instructions' in **section 4**
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Step 2 Provide the required documents needed to identify and verify the name change.

Make copies of your change of name document(s) and arrange for them to be certified.

Certifying copies

You must have someone certify the copies you send to us. The following people can be the certifier:

- an officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more continuous year of service with one or more licensees
- an officer with two or more continuous years of service with one or more financial institutions (for the purposes of the Statutory Declaration Regulations 1993)
- a Justice of the Peace
- a Notary public (for the purposes of the Statutory Declaration Regulations 1993)
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
- a permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership
- a person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
- a Judge of a court
- a magistrate
- a chief executive officer of a Commonwealth court
- a registrar or deputy registrar of a court
- a Police officer
- an Australian consular officer or an Australian diplomatic officer (within the meaning of the Consular Fees Act 1955).

What should the person certifying write?

I [name] of [address] being [capacity e.g. Justice of the Peace] certify this and the following [x] pages as a true copy of the original document. [sign] [date]

Not in English?

Documents not in English must be accompanied by an English translation prepared by an accredited translator visit AUSTRAC English language translation policy www.austrac.gov.au/englishtranslation_policy.html and www.naati.com.au for more information.

Step 3 Send your documents to us.

Before you submit your change of name form, please check that you have:

- signed the change of name form as instructed in Step 1
- included the certified and supporting documents required

Please post your signed change of name form and supporting, certified copies of the relevant change of name document(s) to us.

Send by post:

BT Funds
GPO Box 804
Melbourne VIC 3001

Important Information:

The Responsible Entities for the Funds offered through BT Investment Funds and BT Classic Investment Funds are BT Funds Management No. 2 Limited ABN 22 000 727 659, AFSL 233720 and Westpac Financial Services Limited ABN 20 000 241 127, AFSL 233716. The Responsible Entity for the Funds offered through BT Investor Choice Funds, and the BT Premium Cash Fund, is Westpac Financial Services Limited ABN 20 000 247 127, AFSL 233716.

These funds and their respective Responsible Entities are collectively referred to as 'BT Funds' throughout this form.

The information collected on this form is governed by the BT Privacy Policy which is available on bt.com.au.

1. INVESTOR DETAILS

Account number

Account name

2. EXISTING NAME

Please provide your existing name and title.

Title

Full given name(s)

Surname

3. NAME CHANGE INSTRUCTIONS

Please complete if you are changing the name of an individual or an individual trustee.

Title

Full given name(s)

Surname

Reason for name change - please mark [X] in the box that applies to the reason for this name change.

Change of name due to marriage

Reverting to maiden/former name

Change of name due to formal name change

Please provide one of the following documents:

- a certified copy of Marriage Certificate (issued by the office of Births, Deaths & Marriages)
- a certified copy of Divorce Decree Absolute
- a certified copy of Change of Name Certificate

And one of the following:

- a certified copy of your driver's licence; OR
- a certified copy of your current passport

4. SIGNING INSTRUCTIONS

By completing and signing this form, you:

- acknowledge that I/we have read this PDS in full and agree to be bound by the terms of this PDS and the terms of the relevant constitution(s), each as amended from time to time;
- acknowledge that none of Westpac Banking Corporation or any of its related entities stands behind or otherwise guarantees the capital value or the investment performance of any fund offered in this PDS;
- acknowledge that investments in the Funds are not deposits with, or other liabilities of, Westpac Banking Corporation or any other company in the Westpac Group of companies and that investments in the funds are subject to investment risks, including possible delays in repayment and loss of income and principal invested;
- acknowledge that I/we have read and understood the Privacy Statement in the PDS and acknowledge that the full BT Privacy Policy is available at bt.com.au or by calling 02 8456 0230;
- declare that all the details given on this application form are true and correct;
- acknowledge that the Corporations Act prohibits any person from passing on to another person the application form unless it is attached to or accompanied by the complete and unaltered PDS;
- acknowledge that if I/we have received this PDS from the internet or other electronic means, I/we have received it personally, or a paper print out of it, accompanied by or attached to this application form.

Individual - where the investment is in one name, the account holder must sign.

Joint Holding - joint applicants must all sign unless we have received prior instructions from all investors that any can sign solely.

Companies - where the company has a sole director who is also the sole company secretary, this form must be signed by that person. If the company (pursuant to section 204A of the Corporations Act 2001) does not have a company secretary, a sole director can also sign alone. Otherwise this form must be signed by a director jointly with either another director or a company secretary. Please indicate the capacity in which the form is signed.

Trust - the trustee(s) must sign this form. Trustee(s) signing on behalf of the trust confirm that the trustee(s) is/are acting in accordance with such designated powers and authority under the trust deed.

Power of Attorney - if signing under a power of attorney, you verify that, at the time of signing, you have not received notice of revocation of that power. Please provide an originally certified copy of the power of attorney including the appointed power of attorney's signature, if not already provided to us.

Know Your Customer (KYC) - If you have not been previously identified, we may ask you to submit updated KYC information before processing your request to verify your identity.

Old signature

Please print full name

Date (DD/MM/YY) / /

Signature of investor 2, Joint Account Holder, director/company secretary or authorised signatory

Signature

Please print full name

Date (DD/MM/YY) / /

New signature

Please print NEW full name

Date (DD/MM/YY) / /