Client Services contact details
Phone: Aus | (02) 8456 0230 **New Zealand** | 0800 894 131
Send your form by email:
btfunds_transactions@unitregistry.com.au
Email enquiries:
btfunds@unitregistry.com.au

Additional Investment Form
BT Investor Choice Funds
BT Premium Cash Fund

Use this form if you are an existing investor and wish to make an additional investment.
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.

New Zealand investors in the BT Premium Cash Fund are unable to make additional investment into the BT Premium Cash Fund.

HOW TO COMPLETE THIS FORM

Step 1 **Read and ensure you understand the Product Disclosure Statement (PDS) for the BT Premium Cash Fund, or the PDS for the BT Investor Choice Funds for the relevant Fund within the BT Investor Choice Funds you are making an additional investment into.**
The PDSs for the BT Premium Cash Fund and the BT Investor Choice Funds are available at bt.com.au/personal/help/pds. If you are unable to access the link or print the document, contact us on (02) 8456 0230 within Australia, or 0800 894 131 within New Zealand.

Step 2 **Please ensure you have completed the following:**
- written your account number and account name as it appears on the latest statement
- written the amount in Australian dollars
- selected the payment method you would like to use
- signed the form as per the 'Signing instructions' in section 5

Step 3 **Send your documents to us.**
You can return your forms by post or email according to the details below:

Scan and email* to: btfunds_transactions@unitregistry.com.au
*Please include your account number in the subject line of your email.

Send by post:
BT Funds
GPO Box 804
Melbourne VIC 3001

Step 4 **Transfer your application money to us.**
Please refer to **section 4** 'Payment of application amount'.

IMPORTANT INFORMATION

- New Zealand investors in the BT Premium Cash Fund are unable to make additional investment into the BT Premium Cash Fund
- You must have read the PDS before completing this Additional Application Form.
- All words and phrases used in this application form have the same meaning, if any, given to them in the PDS.
- Please ensure all relevant fields are completed. If you do not complete all relevant sections your application may be rejected and returned to you for completion, resulting in a delay in processing your application.
- If you have any questions as you complete this form, please refer to the FAQs of this form, or contact us on (02) 8456 0230 within Australia.

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

Section A: DDO Obligations

The following questions may assist Westpac Financial Services Limited in meeting its regulatory obligations by determining whether this financial product is being offered to the stated target market.

The below only needs to be answered where you are a direct [retail] investor (i.e. does not apply to indirect or intermediated investments such as those made by platforms, custodians, etc).

Was this investment made based on personal advice received from your financial adviser?

☐ **Yes -** please ensure the details of your financial adviser are completed in Section B

☐ **No -** please complete the questions below:

A. What is your primary investment objective in relation to this investment? (select only one option)

Capital growth (you seek to invest in a product designed or expected to generate capital return over the investment timeframe. You prefer exposure to growth assets (such as shares or property) or otherwise seeks an investment return above the current inflation rate).	☐
Capital preservation (you seek to invest in a product designed or expected to have low volatility and minimise capital loss. You prefer exposure to defensive assets that are generally lower in risk and less volatile than growth investments (this may include cash or fixed income securities).	☐
Income distribution (you seek to invest in a product designed or expected to distribute regular and/or tax-effective income. You prefer exposure to income-generated assets (this may include high dividend-yielding equities, fixed income securities and money market instruments)).	☐

B. What is your investment timeframe in relation to this investment? (select only one option)

Up to and including 2 years (i.e. Short term)	☐
More than 2 years but less than 5 years (i.e. Medium term)	☐
Equal to 5 years but less than 7 years (i.e. Medium to long term)	☐
Equal to 7 years or more (i.e. Long term)	☐

C. Under normal circumstances, within what period do you expect to be able to access your funds for this investment? (select only one option)

Within one week	☐
Within one month	☐
Within three months	☐
Within one year	☐
More than one year	☐

D. In relation to this investment, which investment risk and return profile best describes you? (select only one option)

Low risk and return: You are looking for an investment that is low risk in nature (e.g. you have the ability to tolerate up to 1 negative return over a 20-year period and you are comfortable with a low target return from this investment).	☐
Medium risk and return: You are looking for an investment that is moderate or medium risk in nature (e.g. you have the ability to tolerate up to 4 negative returns over a 20-year period and you are comfortable with a moderate target return from this investment).	☐
High risk and return: You are looking for an investment that is higher risk in nature (e.g. you have the ability to tolerate up to 6 negative returns over a 20-year period in order to achieve a higher target return from this investment).	☐
Very high risk and return: You are looking for an investment that is very high risk in nature (e.g. you have the ability to tolerate 6 or more negative returns over a 20-year period as you are seeking to maximise returns and you can accept higher potential losses).	☐
Extremely high risk and return: You are looking for an investment that is extremely high risk in nature (e.g. you have the ability to accept significant volatility and losses as you are seeking to obtain accelerated returns (potentially in a short timeframe)).	☐

E. What percentage of your total investable assets are you directing to this fund - that is the total assets you have available for investment, excluding your residential home? (select only one option for each Fund you'd like to invest in below)

Fund	APIR	Intended product use (% of investable assets)
BT Investor Choice Dynamic Growth	WFS0034AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Investor Choice Balanced Growth Fund	WFS0033AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Investor Choice Moderate Growth Fund	WFS0032AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Investor Choice International Share Fund	WFS0023AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)

Fund	APIR	Intended product use (% of investable assets)
BT Investor Choice All Australian Share Fund	WFS0103AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Investor Choice All Australian Growth Share Fund	WFS0102AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Investor Choice Australian Property Securities Fund	WFS0101AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Investor Choice Australian Bond Fund	WFS0013AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Investor Choice Cash Management Trust	WFS0011AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)
BT Premium Cash Fund	BTA0173AU	☐ Solution/Standalone (up to 100%) ☐ Major allocation (up to 75%) ☐ Core component (up to 50%) ☐ Minor allocation (up to 25%) ☐ Satellite allocation (up to 10%)

Note: Acceptance of your application should not be taken as a representation or confirmation that an investment in the fund is, or is likely to be, consistent with your intentions, objectives and needs as indicated in your responses to these questions.

Section B: Financial Adviser Details

Notice to financial adviser: by completing this section of the application form, you are confirming that you hold a current Australian Financial Services Licence (AFSL), or are otherwise authorised to advise on and arrange this product.

Details

AFSL holder name

AFSL number

Adviser name

Adviser email address

Adviser code or Authorised representative number

ABN

Property/building name

Unit

Street number

Street name

Suburb

State

Postcode

Country

Phone

Mobile

Performance of investor identification & verification procedures

Please indicate below whether client identification and verification procedures have been performed.

☐ No - I have not performed the applicable customer identification procedure on this investor.

☐ Yes - I have completed the applicable customer identification procedure on this investor.

Financial adviser declaration

Notice to financial adviser: please note that reliance on the KYC performed by the financial adviser is only acceptable if all the criteria below is met.

☐ I hold an AFSL in my own name or have been appointed as an authorised representative by the licensee.

☐ I am a reporting entity for AML/CTF purposes.

☐ The issuer has reasonable grounds to believe that it is appropriate to rely on the KYC procedure I have undertaken.

☐ I have attached original certified copies of the ID documents to this form.

AFSL full legal entity name

AFSL number

Please print full name

Signature

Date (DD/MM/YYYY)

/ /

1. INVESTOR DETAILS

Account number

Account name

2. INVESTMENT DETAILS AND DISTRIBUTION INSTRUCTIONS

Please specify the amount(s) you wish to invest.

If you are an existing unit holder in the fund for which you are applying, the distribution choice below will override any pre-existing election. If you have not previously provided your bank account information, please complete a Change of Bank Account form. If you do not make an election and have not made one before, distributions will be reinvested.

BT Premium Cash Fund	APIR	Investment amount AUD$	Distribution option (indicate (X) one option per fund)	
			Pay to my bank a/c	Reinvest
BT Premium Cash Fund	BTA0173AU			

BT Investor Choice Funds	APIR	Investment amount AUD$	Distribution option (indicate (X) one option per fund)	
			Pay to my bank a/c	Reinvest
BT Investor Choice All Australian Growth Share Fund	WFS0102AU			
BT Investor Choice All Australian Share Fund	WFS0103AU			
BT Investor Choice Australian Property Securities Fund	WFS0101AU			
BT Investor Choice Australian Bond Fund	WFS0013AU			
BT Investor Choice Balanced Growth Fund	WFS0033AU			
BT Investor Choice Cash Management Trust	WFS0011AU			
BT Investor Choice Dynamic Growth Fund	WFS0034AU			
BT Investor Choice International Share Fund	WFS0023AU			
BT Investor Choice Moderate Growth Fund	WFS0032AU			

Note: Please nominate one distribution option for each fund you are investing in. If no selection is made, distributions will be automatically re-invested.

The Funds listed in the table below are not open to new investors. Only investors who currently hold units in these Funds are able to make an additional investment request.

BT Investor Choice Funds	APIR	Investment amount AUD$	Distribution option (indicate (X) one option per fund)	
			Pay to my bank a/c	Reinvest
BT Investor Choice All Australian Share - NEF	WFS0327AU			
BT Investor Choice Australian Growth Share Fund	WFS0022AU			
BT Investor Choice Australian Share Fund	WFS0021AU			

3. OTHER INSTRUCTIONS

If you wish to change your other instructions (such as your reporting preferences, Financial Adviser information, or contact details), please complete the relevant form, available from our website https://www.bt.com.au/personal/help/investment-solution-all-forms.html.

4. PAYMENT OF APPLICATION AMOUNT

Select your payment method and complete the relevant section if applicable. All payments must be made in AUD.

☐ EFT ☐ Direct Debit ☐ BPAY®

EFT	Electronic Funds Transfer
Account name:	Westpac Financial Services Limited
BSB:	082-001
Account number:	718318333
Your reference:	(please use the name of the investor and investor number)

Direct debit authority – Australian bank accounts only

You can allow us to deduct your application amount directly from your nominated financial institution account by completing the direct debit authority below. This debit will be made through the Bulk Electronic Clearing System (BECS) from your account held at the financial institution you have nominated below.

Financial institution name

Branch name

Account name

BSB number

Account number

I/We authorise Westpac Financial Services Limited ABN 20 000 241 127 (User ID 662814) to, until further notice, arrange for funds to be debited from the account at the financial institution identified above through the Bulk Electronic Clearing System. I/We acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Request Service Agreement on page 9 of this form.

Signature of primary account holder

Please print full name

Date (DD/MM/YYYY)

__ __ / __ __ / __ __ __ __

Signature of joint account holder (if applicable)

Please print full name

Date (DD/MM/YYYY)

__ __ / __ __ / __ __ __ __

BPAY® – Telephone & internet banking

You can make your payment using telephone or internet banking.

You will need to quote the biller code and your account number (for reference) when making this payment.

If this is a new investment, we will notify you of your account number once this is available. Please make your payment within 14 days of this notification.

Contact your bank or financial institution to make this payment from your cheque, savings, debit or transaction account.
More info www.bpay.com.au

®Registered to BPAY Pty Ltd ABN 69 079 137 518

NOTE: When using BPAY to make an additional investment, please complete and submit this additional investment form to btfunds_transactions@unitregistry.com.au once the BPAY payment has been made.

Fund name	BPAY® details
BT Investor Choice All Australian Share - NEF*	Biller code: 448746 Reference number: Your account number
BT Investor Choice All Australian Growth Share Fund	Biller code: 448720 Reference number: Your account number
BT Investor Choice All Australian Share Fund	Biller code: 448563 Reference number: Your account number
BT Investor Choice Australian Property Securities Fund	Biller code: 448555 Reference number: Your account number
BT Investor Choice Australian Bond Fund	Biller code: 448639 Reference number: Your account number
BT Investor Choice Australian Growth Share Fund*	Biller code: 448613 Reference number: Your account number
BT Investor Choice Australian Share Fund*	Biller code: 448571 Reference number: Your account number
BT Investor Choice Balanced Growth Fund	Biller code: 448548 Reference number: Your account number
BT Investor Choice Cash Management Trust	Biller code: 448704 Reference number: Your account number
BT Investor Choice Dynamic Growth Fund	Biller code: 448621 Reference number: Your account number
BT Investor Choice International Share Fund	Biller code: 448647 Reference number: Your account number
BT Investor Choice Moderate Growth Fund	Biller code: 448597 Reference number: Your account number
BT Premium Cash Fund	Biller code: 448753 Reference number: Your account number

* This Fund within the BT Investor Choice Funds is closed to new investors. Only investors who currently hold units in this Fund are able to make an additional investment request.

Direct Debit Request Service Agreement

By completing the Direct Debit Request that forms part of the Application Form, you will be providing us with the ability to debit your nominated account and transfer the amount you request to your investment. This agreement sets out the terms on which you authorise us to deduct from your account with your financial institution any amounts that become payable to an investment with us.

Direct Debit Arrangements

- For initial applications made by completing a Direct Debit Request, we will debit the amount(s) nominated from your account generally within two business days of receiving a valid application.
- For subsequent investments, when we receive a valid instruction either by phone, letter or over the internet, we will debit your account generally within two business days of receiving the instructions (provided we have previously received a valid Direct Debit Request).
- A valid instruction will be an instruction given by you or from a person nominated by you to provide such instructions.

Regular Savings Plans Arrangements

- For investments made under a Regular Investment Plan, we will debit your account on or around the 15th of each month.
- Where the due date falls on a non-business day, we will draw the amount on the next business day. If you are uncertain about when the debit will be processed to your nominated account, you should enquire directly with your financial institution where the account is based.

Your Responsibilities

It is your responsibility to:

- Ensure that your financial institution allows direct debits on your nominated account as direct debiting is not available on all accounts offered by financial institutions.
- Ensure that your nominated account details are correct, and if uncertain, to check with your financial institution before completing the Direct Debit Request.
- Ensure that sufficient cleared funds are available in your nominated account by the due date to permit payments under the Direct Debit Request.
- Ensure that the authorisation given to draw on your nominated account is identical to the account signing instruction held by your financial institution where the nominated account is based.
- Advise us if your nominated account is transferred or closed or your nominated account details change.
- Arrange with us a suitable alternate payment method if the drawing arrangements are cancelled either by you or your financial institution.

Your Rights

- You may cancel, alter, defer or suspend your Direct Debit Request, or stop or suspend an individual debit from taking place without incurring a penalty, by calling us. In some cases we will require your written confirmation.
- You must notify us at least seven business days before the next scheduled debit to ensure changes are effective that month. Notification received after that time may result in your changes taking effect in the following month. You may also be able to stop an individual debit by contacting your own financial institution. You may be liable for financial institution charges if you do this; the financial institution should have information on these.
- If you have any questions or concerns about your Direct Debit Request, such as where you consider that a drawing has been initiated incorrectly, you should take the matter up directly with us.
- If you lodge a complaint with us, we will let you know that we have received your complaint and a Customer Manager will try to resolve your complaint within 30 days. If you're still not satisfied with the response or have not received a response from the Customer Manager in 90 days, you can contact the Australian Financial Complaints Authority (AFCA) by calling 1800 931 678 or the Financial Markets Authority on 0800 434 566 (New Zealand investors only).

Our Commitment to you

- We will only change the amount of the payment under the Direct Debit Request on receipt of a valid instruction.
- If we vary the terms of this agreement, we will give you notice as soon as reasonably possible (which may be before or after the change is made). If we believe the change is unfavourable to you, we will provide you with at least 30 days' notice.
- Should we receive a request from you to cancel or alter the Direct Debit Request, we will process your request promptly and without incurring a penalty.
- We reserve the right to cancel your drawing arrangements if two or more consecutive drawings are returned unpaid by your nominated financial institution. Standard government fees, duties and bank charges (including dishonour fees and conversion costs) may apply to investments. These are paid by the investor.
- We will keep all your records and information pertaining to your nominated account at the financial institution private and confidential, except to the extent required by law or where you have made a claim relating to a debit you believe has been made incorrectly, or wrongfully, including circumstances where our sponsor in the Bulk Electronic Clearing System may require us to provide this information to them in connection with your claim to the extent necessary to resolve your claim.

5. SIGNING INSTRUCTIONS

By completing and signing this form, you (the applicant) are telling us:

- you acknowledge that you have read and understood a copy of the current BT Investor Choice Funds and/or BT Premium Cash Fund PDS and you agree to be bound by the PDS and the relevant constitution(s), each as amended from time to time
- you declare that all the details given in this additional application are true and correct
- monies deposited are not associated with crime, money laundering or terrorism financing, nor will monies received from your account have any such association
- you are not bankrupt or a minor, and
- you agree to be bound by the constitution of the Fund and the PDS as a supplemented, replaced or re-issued from time to time.

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 you have not already lodged the Power of Attorney with us, please attach a certified copy of the Power of Attorney document that includes Certificate of Witness and Statement of Acceptance and Certified Identification Document of the Power of Attorney. I/we attest that the Power of Attorney has not been rescinded or revoked and that the Donor is still living.

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.

Signature of investor 1, director/company secretary or authorised signatory

Signature

Please print full name

Date (DD/MM/YY) __ __ / __ __ / __ __ __ __

Company officer (please indicate company capacity)	
Director	☐
Sole Director and Company Secretary	☐
Authorised Representative	☐

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

Signature

Please print full name

Date (DD/MM/YY) __ __ / __ __ / __ __ __ __

Company officer (please indicate company capacity)	
Director	☐
Company Secretary	☐
Authorised Representative	☐