



# Single Investor Transfer

BT Adviser Services ☎ 1800 025 127 (8.00am – 6.30pm Mon – Fri Sydney time)

BT Margin Lending Contact Centre ☎ 1800 671 409 (8.00am - 6.30pm Mon – Fri Sydney time)

Use this form to transfer a single investor between BT Retail and/or Margin Lending advisers.

Complete this form using **black pen** – print in clear **CAPITAL LETTERS**

## 1. INVESTOR DETAILS

Investor number (mandatory)

### Investor A – Individuals, Joint Investors or Trustees

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Daytime phone number

Mobile phone number

### Investor B – Joint Investors or Trustees

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

Daytime phone number

Mobile phone number

### Companies, Associations or Other Investors

Full name of company, association or other investor

### Account reference

Provide your account reference (where account is held on behalf of others)

## 2. PREVIOUS ADVISER DETAILS

BT Adviser number

A

Margin Lending Adviser number

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Dealer group

## 3. NEW ADVISER DETAILS

Title

Mr  Mrs  Miss  Ms  Other

Given name(s)

Surname

Dealer group

Is the investor being transferred a:

BT Retail investor?

Please provide your Retail Adviser number

A

BT Margin Lending investor?

Please provide your Margin Lending Adviser number

AFSL Number/ASIC Authorised Representative Number

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#### 4. SIGNATURES

Signature of **Investor A**

Date (dd/mm/yy)

Signatory's name *(please print)*

Signature of **Investor B**

Date (dd/mm/yy)

Signatory's name *(please print)*


Signature of **new Adviser**

Date (dd/mm/yy)

**You can submit this form by:**


**Retail**

 mail BT  
GPO Box 2675  
Sydney NSW 2001

 fax (02) 9274 5670

**Margin Lending**

 mail BT Margin Lending  
GPO Box 3917  
Sydney NSW 2001

 fax (02) 9274 5782