



Adviser Registration and Change of Details

BT Adviser Services © 1800 025 127 (8.00am – 6.30pm Mon-Fri Sydney time)
BT Margin Lending Contact Centre © 1800 671 409

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

Use this form to set up a new adviser for BT Retail/Corporate Super and/or Margin Lending products, or change the details of an existing adviser.

Please take the following action based on the information provided

- Register as a new adviser (Complete all sections)
- Change the details of an existing adviser (Relevant sections to your change)

BT Adviser number

A

AND

Margin Lending Adviser number

1. NEW ADVISER NAME

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

2. NEW ADVISER CONTACT DETAILS

Office address

State Postcode

Postal address (if different from above)

State Postcode

Daytime phone number

()

Mobile phone number

Fax number

()

Email address

3. DEALER GROUP DETAILS

Dealer Group name

BT Dealer Group number

A

Please provide the adviser's AFSL Number/ASIC Authorised Representative Number and attach a copy of AFSL.

4. TAXATION DETAILS

Please provide the Australian Business Number (ABN) of the Licensee. Fees cannot be paid if an ABN is not supplied.

Australian Business Number (ABN)

5. INVESTOR TRANSFER

If investors are to be transferred to the new adviser please provide the existing adviser code and name, and complete a Bulk Investor Transfer form or Single Investor Transfer form available from bt.com.au

Previous adviser name

Previous BT adviser number

A

OR

Previous Margin Lending adviser number

6. REQUIRED DOCUMENTATION

A letter of Authority from Dealer Group that authorises you to act on their behalf. A template of this letter has been supplied. This letter must be provided on Dealer Group company letterhead.

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01-04-008-01

6. ADVISER SIGNATURE

Signature of Adviser

Date (dd/mm/yy)

Signatory's name (please print)

Adviser stamp (please use black ink only)


You can submit this form by:


Retail Corporate/Super

 mail BT
GPO Box 2675
Sydney NSW 2001

Margin Lending

 mail BT Margin Lending
GPO Box 3917
Sydney NSW 2001

 fax (02) 9274 5670

 fax (02) 9274 5782

[Company Letterhead]

Letter of Authority to Act on Behalf of Dealer Group

BT Adviser Processing:

Please set up [insert adviser name] as an authorised representative of [insert Dealer Group name].

Signed by

[Print name]

Authorised Representative

[insert date]