BT Panorama

Issued August 2026

Investments account closure

Use this form to:

Request a full account closure of your Panorama Investments account. If you hold an existing Holder Identification Number (HIN), your HIN will be cancelled.

Do not use this form to:

- Close a Panorama Super account. Refer to 'Super account closure' form.
- Request transfer of assets as part of a Panorama Investments account closure.
  - To transfer assets from a Panorama Investments account to another Panorama Investments account, refer to the 'Internal asset transfer – Panorama Investments' form;
  - To transfer assets from a Panorama Investments account to an external party, refer to the 'Notification of asset transfer out' form.

You can type directly into the form or print then complete in block letters. Each applicable section of the form must be completed for this request to be processed.

Important Information

All assets should be sold before this form is submitted. Otherwise assets not sold prior to this form being submitted will be sold by the Administrator on your behalf. Term deposits require at least 31 days notice to be closed prior to maturity, unless hardship applies as defined by the issuer.

If signing under a power of attorney, provide a certified copy including the attorney's signature. If you have a linked margin loan, the loan must be paid in full and approval received from the margin lender before your account can be closed.

Privacy Statement and Consent Request

Privacy Statement

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statement which is available at www.bt.com.au/privacy/privacy-statement or by calling us. Our Privacy Statement also provides information about how you can access and correct your personal information, and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your request.

Your Consent

By signing below, you consent to us collecting and holding any sensitive information such as health information or information about your racial or ethnic origin which appears on copies of your identity documents. You will not be able to withdraw your consent to us holding this information after it has been provided because we are required to retain a record of your personal information that is contained in your identification documents under the Anti-Money Laundering and Counter Terrorism Financing Act 2006 (Cth).

1 Adviser details (if applicable)

Dealer group name

First name

Last name

2 Account details

Important: you can *only* select one option below.

Account type

☐ Individual ☐ Joint ☐ SMSF

☐ Company ☐ Trust

Account ID

Account name

DECI1IBTF31818

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3 Payment details

You can select your withdrawal benefit to be deposited into your primary linked account or to another existing linked account.

Select which account, linked to your BT Panorama, the funds can be deposited to[1]:

- ☐ Primary linked account
- ☐ Other existing linked account

Important: The account you use, must already be linked to your BT Panorama. To review your current linked accounts, sign in to your Panorama account online then select '*Linked accounts*'. Alternatively, you can link a new account online via the '*Linked accounts*' page, before completing this form.

BSB **Account number**

Include the Payment Reference Number[2] if this is for a SMSF rollover out.

Note

1. Check to ensure the linked account is a valid bank account before submitting this form.
2. Contact your Electronic Service Address (ESA) provider to obtain a PRN.

4 Reason for closure

Please select all applicable reasons below

- ☐ Fees and charges
- ☐ Performance
- ☐ Product functionality
- ☐ Service issue with BT
- ☐ Retirement
- ☐ Change to my adviser/dealer group
- ☐ Recommended by your financial adviser
- ☐ Other (eg Buying a house, consolidation)

5 Confirmation of your identity

To safeguard your account against fraudulent action, you must complete sections 6 and 7 of this form so we can confirm your identity prior to closing your Panorama account. This documentation must be completed for your request to be processed.

6 Authorisation and Consent

The liability of BT Portfolio Services Limited (the Administrator), including its authorised agents, is limited to the full extent permitted by law (except to the extent such damages, liabilities, costs or expenses are caused by the negligence or default of the Administrator or its authorised agents) where it arises directly or indirectly from acting on the information or instructions provided under, or associated with, this form.

I/we declare that all details given on this form are true and correct and that all other details previously given on my/our account application for Panorama remain true and correct.

If signing under a power of attorney, I/we verify that at the time of signing, I/we have not received notice of revocation of that power.

I/we acknowledge that the Administrator will sell down all assets in this account if assets are not sold prior to submission of this form which prevents the ability to participate in voluntary corporate actions.

I/we acknowledge that BT will break all open term deposits on this account and that the interest rate may be reduced for an early withdrawal.

I/we acknowledge that there may be delays in closing the account if underlying investments cannot be sold or realised immediately.

I/we acknowledge if I/we have a linked margin loan, the loan must be paid in full and approval received from the margin lender before the account can be closed.

In the case of company signatories, two directors or a director and company secretary must sign unless the company has a sole director and a sole secretary.

In the case of incorporated associations, signatories must indicate their position as 'Other account owner'. For multiple trustees, two must sign.

I/we agree to the consents in the Privacy Statement and Consents Request section.

Signature of account holder/s approving account closure

Account holder 1

Signature of approving account holder 1

(Digital signature accepted, excluding typed signature)

Date (dd/mm/yyyy)

Full name (please print)

Account closure form

Signatory's role on the account

☐ Investor ☐ Director ☐ Secretary

☐ Trustee ☐ Other account owner (specify below)

Account holder 2

Signature of approving account holder 2

(Digital signature accepted, excluding typed signature)

Date (dd/mm/yyyy)

Full name (please print)

Signatory's role on the account

☐ Investor ☐ Director ☐ Secretary

☐ Trustee ☐ Other account owner (specify below)

Account holder 3

Signature of approving account holder 3

(Digital signature accepted, excluding typed signature)

Date (dd/mm/yyyy)

Full name (please print)

Signatory's role on the account

☐ Investor ☐ Director ☐ Secretary

☐ Trustee ☐ Other account owner (specify below)

Account holder 4

Signature of approving account holder 4

(Digital signature accepted, excluding typed signature)

Date (dd/mm/yyyy)

Full name (please print)

Signatory's role on the account

☐ Investor ☐ Director ☐ Secretary

☐ Trustee ☐ Other account owner (specify below)

Account holder 5

Signature of approving account holder 5

(Digital signature accepted, excluding typed signature)

Date (dd/mm/yyyy)

Full name (please print)

Signatory's role on the account

☐ Investor ☐ Director ☐ Secretary

☐ Trustee ☐ Other account owner (specify below)

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7 Identification requirements for account closure

Note: If you are submitting this request via your primary registered email address, the ID does not need to be certified. If you are submitting this request via mail, refer to section 7 and 8 for how to certify your documents.

Provide certified copies of documents that show full name and either date of birth or residential address for all approving signatories.

- Complete Part A to tell us what documents you are sending us.
- If you cannot send us a certified copy of a document from Part A, then complete Part B.
- Contact us if you are unable to provide the required documents in Parts A or B.
- Do not send original documents, only certified copies. Refer to section 8 for how to certify your documents.

Part A

Acceptable primary photographic ID documents

Select one valid option from this section

- ☐ Australian driver's licence/learner's permit
- ☐ Australian passport – must not be cancelled, defaced or mutilated (a passport that has expired within the preceding 2 years is acceptable)
- ☐ Australian proof of age card issued by a State or Territory
- ☐ Foreign passport or travel document issued by a foreign government, the United Nations, or an agency of the United Nations (must not be cancelled, defaced or mutilated) which contains either a signature OR a unique identifier of the person*
- ☐ Foreign driver's licence/permit that contains a photograph of the person in whose name it is issued and the individual's date of birth*
- ☐ National identity card issued by a foreign government, the United Nations or an agency of the United Nations which contains either a signature OR a unique identifier of the person*

*documents written in a language other than English must be accompanied by an English translation prepared by an accredited translator

OR

Part B

Acceptable primary non-photographic ID documents

(Should only be completed if you do not send a certified copy of a document from Part A)

Select ONE Primary Non-Photographic Document from this section

- ☐ Australian birth certificate (or extract) issued by a State or Territory
- ☐ Australian citizenship certificate (including a Citizenship by Descent Certificate)
- ☐ Centrelink pension card (Australian)
- ☐ Centrelink health care card (Australian)

AND **ONE Secondary Identification Document from this section**

- ☐ A notice issued by the Commonwealth or a State/Territory within the last 12 months that includes the individual's name and residential address and records the provision of financial benefits (e.g. Centrelink notice)
- ☐ A notice issued by the Australian Taxation Office (ATO) within the last 12 months that includes the individuals name and residential address and records a debt payable by or to the individual (e.g. tax assessment)
- ☐ Utilities notice issued by a local government or utilities provider within the last 3 months and includes the customer's name and residential address and records the provision of a service to that address or name

8 How to certify your documents

A certified copy is a document that has been certified as a true copy of an original document. To certify a document, take the original document and a photocopy to one of the people listed below (eligible certifiers) and ask them to certify that the photocopy is a true and correct copy of the original document.

The eligible certifier will need to print their name, date and the capacity in which they are signing (eg postal agent, Justice of the Peace). Sample wording is provided below.

> I, [full name], as [category of persons as listed below], certify that this [name of document] is a true and correct copy of the original.

Who can certify copies of documents

- A solicitor or barrister
- A justice of the Peace
- A police officer
- An Accountant who is:
  - A fellow of the National Tax Accountants' Association; Or
  - A member of any of the following:
    - Chartered Accountants Australia and New Zealand;
    - the Association of Taxation and Management Accountants;
    - CPA Australia;
    - the Institute of Public Accountants

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- 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 two or more years of continuous service who is employed in an office supplying postal services to the public
- 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 finance company officer with two or more continuous years of service with one or more finance companies (for the purposes of the Statutory Declaration Regulations 1993)
- An officer with, or authorised representative of, a holder of an Australian financial services licence, having two or more continuous years of service with one or more licensees

For a complete list of people who can certify your identification documents please refer to our website https://www.bt.com.au/content/dam/public/panorama/pdf/BT_Panorama_-_How_to_certify_documents_flyer.PDF

You can submit this form by:

email: professional@panorama.com.au
mail: BT Panorama,
GPO Box 2861, Adelaide SA 5001