

Additional account instructions for Panorama Investments

i Use this form to:

Set up a drawdown strategy, cash investment strategy and/or a regular investment plan.

You must complete one form per account for which you wish to provide instructions. You can type directly into the form and print before signing, or print then complete in block letters. Each applicable section of the form must be completed for the request to be processed. **Please return this form to your adviser for processing. Do not send this form to Panorama Investments.**

Important information

Setting up a drawdown strategy, cash investment strategy and/or a regular investment plan

You can use this form to setup a drawdown strategy to receive a regular payment, set up a cash investment strategy which will allow you to set the maximum cash balance in your transaction account and an amount to invest above this amount, and/or setup a regular investment plan.

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.

1 Your account details

Account number

2 Your personal details

Full name

Date of birth (dd/mm/yyyy)

3 Drawdown strategy

Note: drawdowns are processed at approximately 10.30am Sydney time. You can log in to your Panorama account online and check the Order status page to confirm whether a drawdown has occurred. You'll also receive a confirmation alert.

Select your drawdown strategy:

Asset with highest value (this strategy sells assets from highest to lowest value)

Pro-rata to total holdings (this strategy will distribute the sale of assets proportionately based on their current value)

Individual asset priority (this strategy will distribute the sale of assets starting with the highest priority assets to the lowest priority. If there are sufficient assets in the priority list to meet the drawdown amount, the next highest value asset/s will be sold).

Enter asset name below and rank priority from 1 to 5 with 1 being the highest priority and 5 the lowest priority.

Asset name	Priority

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4 Cash investment strategy

Note: the cash investment strategy will be paused for term deposit maturities where instructions are set to deposit all money into cash. If any of these assets are in regular investment plans, they will also get invested into when the plan runs. For other scenarios where the cash investment strategy may fail, refer to the Panorama Investments Investor Guide & the Additional Information and Terms Booklet.

Maximum Cash Target

\$

Amount to invest (\$100 minimum)

\$ minimum

\$ maximum No maximum

Note: the cash investments strategy buy will trigger when the transaction account balance reaches the maximum cash target + the minimum amount to invest.

Investment start date (dd/mm/yyyy)

Repeat the cash investment

Fortnight Month Quarter Six month

End repeats

No end date Set end date (dd/mm/yyyy)

Investments

Asset name	Cash investment %

5 Regular investment plan

Investments (Current holdings)

Asset name	Investment amount \$

Investment start date (dd/mm/yyyy)

Note: the regular investment will occur on this date or the next business day.

Repeat the cash investment

Fortnight Month Quarter

End repeats

No end date Set end date (dd/mm/yyyy)

6 Declaration & acknowledgements

By signing this form, I am making the following statements:

- I declare that all details given on this form are true and correct and that all other details previously provided in respect of my Panorama Investments account remain true and correct.
- 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.

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If setting up a drawdown strategy

- I authorise the change in drawdown strategy to be made and acknowledge that a specific instruction to make this change has been given.
- I acknowledge that the current copies of the Panorama Investments Investor Guide and the Additional Information and Terms Booklet, the Panorama Financial Services Guide and other relevant disclosure document/s have been received, read and understood.

If requesting a cash investment strategy (also referred to as "automatic reinvesting")

- I confirm that I wish to proceed.
- I have reviewed the above transactions and take full responsibility for their placement, irrespective of the order source.

If setting up a regular investment plan

- I authorise the set up of the regular investment plan
- I authorise the transaction/s to be placed and acknowledge that a specific instruction to place each of the above orders/trades has been given.
- I acknowledge that the current copies of the Panorama Investments Investor Guide and the Additional Information and Terms Booklet, the Panorama Financial Services Guide and other relevant disclosure document/s have been received, read and understood.

Full name

Signature

Date (dd/mm/yyyy)

You can submit this form by:



Please return this form to your adviser for processing. Your adviser must retain a copy of this form for record keeping purposes.

If you have any questions about this form, please contact your adviser or Panorama Support on 1300 784 207.