


Additional account instructions for Panorama Super

 Use this form to:

- Make a personal contribution
- Request a rollover to your Panorama Super account
- 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 Super.**

Important information

Making a contribution

In order to contribute into your superannuation account, you need to be eligible to do so based on age and employment status. Prior to making any contributions using this form, you are required to read the information on making contributions contained in the 'Contributions, rollovers and payments' section of the Booklet.

Requesting a rollover

You can use this form to request a rollover of super from up to 4 other super funds (full or partial rollovers).

Note: If you have made a personal contribution to your other fund(s) in the current or previous financial years for which you wish to claim a tax deduction, but you have not yet completed a 'Notice of intent to claim or vary a deduction for personal super contributions' for those contributions, please contact your other fund(s) prior to submitting this form.

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.

Retirement planning tools

To help you with planning and achieving your retirement goals, our 'Optimise your super' page offers support tools including a checklist, key themes, and links to educational content and tools to get you started. And if you have a financial adviser, they can work with you to make sure you are getting the most out of your super in retirement. You can visit this page by [logging in to your Panorama account](#).

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/personal/help/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)

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3 Make a contribution

(Applicable only if making a contribution)

Eligibility to contribute

Confirm your eligibility to contribute:

I am aged under 75¹

I am aged 75 or more and my contributions will be compulsory employer contributions only²

¹ If eligible, you may be able to claim a tax deduction for your personal contributions. You must complete a 'Notice of intent to claim or vary a deduction for personal super contributions (Personal Tax Deduction Notice)' and receive an acknowledgement from us before claiming personal contributions as a tax deduction in your tax return. Please refer to the 'Taxation' section of the Panorama Super Additional Information Booklet ("Booklet") for further information.

² Other than for SG and Award employer contributions or downsizer contributions, the contribution must be received on or before the day that is 28 days after the end of the month in which you turn 75 (ie if your birthday is in February, the contribution must be received by 28 March).

Payment instructions

Please provide details of an existing linked bank account from which you wish to make the contribution. Note, to add a new linked bank account you can go online via your investor login and select 'manage your accounts and billers'.

Account name

BSB **Account number**

Contribution details

Select the applicable contribution type:

One- off contribution – Personal

Amount \$

One- off contribution – Spouse⁴

Amount \$

Regular contribution – Personal

Frequency	Weekly	Fortnightly		
	Monthly	Quarterly	Yearly	

Amount \$

Start date (dd/mm/yyyy)

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

Regular contribution – Spouse

Frequency	Weekly	Fortnightly		
	Monthly	Quarterly	Yearly	

Amount \$

Start date (dd/mm/yyyy)

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

4 Request a rollover

(Applicable only if requesting a rollover)

Transfer details

Select the applicable rollover type:

Rollover fund 1

Name

Fund USI

Member or account number

Rollover type	Full	Partial \$
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Rollover fund 2

Name

Fund USI

Member or account number

Rollover type Full Partial \$

Rollover fund 3

Name

Fund USI

Member or account number

Rollover type Full Partial \$

Rollover fund 4

Name

Fund USI

Member or account number

Rollover type Full Partial \$

5 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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6 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 BT Panorama Super Disclosure Statement & Additional Information 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 %

7 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 investment plan

Fortnight Month Quarter

End repeats

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

8 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 Super account remain true and correct.
- The liability of BT Portfolio Services Limited and BT Funds Management Limited (together, the Providers), including their 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 Providers or their 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 making a contribution:

- I acknowledge that I have read and agree to the Direct Debit Service Agreement detailed in the Panorama Super Additional Information Booklet.

If requesting a superannuation rollover:

- I am aware I may ask for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and have obtained or do not require such information.
- I consent to my tax file number being disclosed for the purposes of consolidating my super.
- I discharge the super provider of the super account(s) that I am rolling over of all further liability in respect of the benefits paid and transferred to my Panorama Super account.

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 BT Panorama Super Disclosure Statement, Additional Information Booklet and Investment Options 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 BT Panorama Super Disclosure Statement, Additional Information Booklet and Investment Options 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.