

Change of name

i Use this form to:

- Update your name on your Panorama account(s).
- Update your name on your CHESS registration.

You can type directly into the form and print before signing, or print then complete in block letters. Each section of the form must be completed for the update to be processed.

Important information

Supporting documentation

An original certified copy of the proof of name change must accompany this application (e.g. marriage certificate, deed poll, birth certificate). We will be unable to finalise your request without this documentation.

Multiple accounts

If you hold multiple Panorama accounts with the adviser listed in section 1, the changes will be applied to all accounts. If you have Panorama accounts with other advisers, you will need to provide additional forms for each adviser.

If you hold one or more sponsored and/or custodial Holder Identification Numbers (HIN), the changes stated in section 4 of this form will be applied to the CHESS registration of ALL your registered HINs.

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 copies of identification documents under the Anti-Money Laundering and Counter Terrorism Financing Act 2006 (Cth).

1 Your adviser details

Full name

2 Your account details

Account number

3 Your personal details

Full name

Date of birth (dd/mm/yyyy)

4 Change of name

Reason for change

Marriage
 Divorce
 Deed poll

Other (specify below)

New name

New title

Mr
 Mrs
 Ms
 Miss
 Dr

Other (specify below)

First name

Middle name

Last name



Change of name

5 Declarations & acknowledgements

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.

I/we declare that all details provided in respect of my Panorama Investments and/or Panorama Super account remain true and correct.

I/we acknowledge that if I/we hold one or more Holder Identification Numbers (HIN), the changes stated in section 4 of this form will be applied to the CHESS registration of all my/our registered HINs.

I/we consent to the consents in the Privacy Statement and Consent Request section.

Client old signature ([Wet \(pen\) signature](#) required)

Client new signature ([Wet \(pen\) signature](#) required)

Date (dd/mm/yyyy)

You can submit this form by:



mail: BT Panorama,
GPO Box 2861, Adelaide SA 5001

