

# Advice relationship opt-out

## Use this form to:

Transfer account/s to the Panorama non-advised service.

You can type directly into the form or print and complete in block letters using a blue or black pen. Each applicable section of the form must be completed for this request to be processed.

## Important information

- The existing adviser and dealer group will no longer be linked to the account/s. The account holder/s will be fully responsible for managing the account/s and operating their Panorama account/s, including investment decisions and any associated tax consequences. Product features, fees and investment options may change in respect to the account/s.
- Where an account is in the name of a minor and an Opt-Out is received, permissions for the minor will be reinstated.
- If more than four accounts are to be transferred, please attach an additional page.

**Note:** It's important you have read and understood the Panorama Advice Relationship Opt-out Policy. If you choose to manage your account independently, this document outlines the changes that will apply and the responsibilities you will take on. This is available by contacting us on 1300 881 716 or support@panorama.com.au.

## 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](http://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 Previous adviser details

**Full name**

## 2 Account details

The following accounts are to be transferred to the Panorama non-advised service:

### Account 1

**Account name**

**Account number**

### Account 2

**Account name**

**Account number**

### Account 3

**Account name**

**Account number**

### Account 4

**Account name**

**Account number**



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### 3 Declaration & acknowledgements

I/we declare that I/we have fully read this form and the information completed is true and correct. By signing this form, I/we agree to the following terms and conditions:

- The accounts specified above will be transferred to the Panorama non-advised service according to the terms and conditions set out in the relevant disclosure document(s) and the Panorama Advice Relationship Opt-out Policy.
- The liability of BTPS, BTFM, Westpac Banking Corporation (Westpac) and any other company in the Westpac Group of companies, 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 BTPS, BTFM, Westpac and any other company in the Westpac Group of companies, or its/ their authorised agents) where it arises directly or indirectly from the completion of this form.
- If signing under a power of attorney or otherwise signing on behalf of another person, I verify that at the time of signing, I have not received notice of revocation of that power or authority to sign.

#### Signatures

If more than 4 signatures are required, attach additional copies of this page with the relevant details.

In order to sign this form, you must be:

- The currently appointed adviser of the named clients, or a previously appointed authorised person and have the authority to sign on behalf of the currently appointed adviser, or;
- The account holder(s) of the named accounts, or;
- For company signatories, two directors or a director and a company secretary must sign, unless the company has a sole director and sole secretary. Incorporated association signatories must indicate their position in the 'Other' field, or;
- For SMSF signatories, one or two directors or two individual trustees must sign as applicable.

#### Adviser signature (if applicable)

Adviser full name

Adviser signature (Digital signature accepted)

Date (dd/mm/yyyy)

Or

#### Client A (if applicable)

First name

Last name

Signature (Digital signature accepted)

Date (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other (specify below)

If you have completed this form on behalf of a minor, please tick one of the below boxes to indicate your relationship to the minor:

Parent

Financial Manager

#### Client B (if applicable)

First name

Last name

Signature (Digital signature accepted)

Date (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other (specify below)

#### Client C (if applicable)

First name

Last name

Signature (Digital signature accepted)

Date (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other (specify below)



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## Advice relationship opt-out

**Client D** (if applicable)

**First name**

**Last name**

**Signature** ([Digital signature](#) accepted)

**Date** (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other  
(specify below)

### You can submit this form online



Sign in to your account to upload and submit this form:

Tracking > Service requests > Submit new request > Account maintenance

**If you are unable to upload this form, you can submit it by:**

email: [support@panorama.com.au](mailto:support@panorama.com.au)



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