


Change primary authorised user

 Use this form to:

Change primary authorised user of a Panorama account.

The primary authorised user is the person who will perform most of the online transactions on a Panorama account, such as investment transactions (including corporate action elections) and cash transactions.

You can type directly into the form or print and complete in block letters using a blue or black pen. Place a cross in boxes where applicable.

Important information

- To ensure transfers are completed before the end of month, this form should be submitted five business days prior to the last day of the month.
- Where you are requesting for more than one account to be changed, a new form is required for each account.
- If more than 4 clients are associated with the account, attach the additional details.
- Existing advice fee arrangements will be retained. Changes to advice fee arrangements should be managed online through your adviser.

Note: This form must be signed by the adviser and all clients under the account.

Permission definition

Full transact¹ client can add and remove billers and Pay Anyone accounts. Client can make payments and deposits to linked accounts, and payments to billers and Pay Anyone accounts.

Limited change² client can add and remove linked accounts, billers and Pay Anyone accounts.

Limited transact³ client can add and remove billers and Pay Anyone accounts. Client can make payments and deposits to linked accounts.

¹ Full transact option not available on Panorama Super accounts.

² Option to add or remove billers and Pay Anyone accounts is not available on Panorama Super accounts. Client can add or remove linked accounts only.

³ Option to add and remove billers and Pay Anyone accounts not available on Panorama Super accounts. Clients can transact on linked accounts only.

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 Adviser details

Adviser's name

2 Your account details

Account name

Account number



DECI1IBTF31817

Change primary authorised user

3 Primary authorised user

Select the primary authorised user of your account and the permissions, where applicable.

Investor managed

No permission selection is required for Investor managed accounts

Or

Adviser managed

Select the applicable permissions for your adviser and each account holder:

Adviser permissions

Transact on linked accounts only

Transact on linked accounts, limited billers and payees

and

Investor permissions

Client 1

Full name

Full transact

Limited change

Limited transact

Client 2

Full name

Full transact

Limited change

Limited transact

Client 3

Full name

Full transact

Limited change

Limited transact

Client 4

Full name

Full transact

Limited change

Limited transact

4 Authorisation & acknowledgments

Note: For permission definitions, refer to important information.

By signing this form, I/we agree to the following terms and conditions:

- The clients named in section 3 will be provided with updated permission access to the account named in section 2.
- I/we declare that all details given on this form are true and correct and that all other details currently reflected on Panorama online 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. Please provide a certified copy of the power of attorney including the attorney's signature.
- None of Westpac or any of its related entities stands behind or otherwise guarantees the capital value or investment performance of any investments in Panorama Investments or Panorama Super.
- The liability of BTPS, BTFM, 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.



Change primary authorised user

Adviser name

Signature ([Digital signature](#) accepted)

Date (dd/mm/yyyy)

Client 3

Full name

Signature ([Digital signature](#) accepted)

Date (dd/mm/yyyy)

Signature of authorised person/s

For company signatories, two directors or a director and a company secretary must sign, unless the company has a sole director who is also the sole secretary. Incorporated association signatories must indicate their position in the 'Other' field.

For SMSF signatories, one or two directors or two individual trustees must sign as applicable.

- | | | |
|----------------|---------------------------|-----------------------|
| Account holder | Trustee | Director |
| Secretary | Sole director & Secretary | Other (specify below) |

Client 1

Full name

Signature ([Digital signature](#) accepted)

Date (dd/mm/yyyy)

Client 4

Full name

Signature ([Digital signature](#) accepted)

Date (dd/mm/yyyy)

- | | | |
|----------------|---------------------------|-----------------------|
| Account holder | Trustee | Director |
| Secretary | Sole director & Secretary | Other (specify below) |

- | | | |
|----------------|---------------------------|-----------------------|
| Account holder | Trustee | Director |
| Secretary | Sole director & Secretary | Other (specify below) |

Client 2

Full name

Signature ([Digital signature](#) accepted)

Date (dd/mm/yyyy)

- | | | |
|----------------|---------------------------|-----------------------|
| Account holder | Trustee | Director |
| Secretary | Sole 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: professional@panorama.com.au



DECIXIBTF31817