BT Panorama

Issued March 2026

# Change of account menu or badge

## Use this form to:

Request a change between:

- **Full, Compact and Focus menus on Panorama Investments or Panorama Super, or**
- **BT Panorama Investments and Asset Administrator Investments, or**
- **BT Panorama Super and Asset Administrator Super, or**
- **Morgan Stanley Portfolio Plus Investment and BT Panorama Investment, or**
- **Morgan Stanley Portfolio Plus Super and BT Panorama Super.**

**This will transfer the account number and existing account details, automated regular investments, payments, holdings, transaction history and Significant Investor Visa (SIV) status (if applicable).**

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

## Important information

- Your request may be delayed where there are outstanding transactions relating to the account nominated in this form (the account), including investment orders, corporate actions or in-progress asset transfers into the account.
- If the account holds assets that are not available in the new selected menu or badge option, please sell these assets before submitting this request.
- If you request to change from the Full to the Compact or Focus menu, any existing Holder Identification Number (HIN) associated with the account will be cancelled. Requests that involve the cancellation of a sponsored HIN can only be submitted by the account holder/s.
- Grouping of accounts for 'fees and reporting' is not available to accounts on the Focus menu. If you request to change to the Focus menu, the account will be removed from any existing 'fees and reporting' related groups.
- 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.
- Any waiver or reduction to the Administration Fee may cease to apply and revert to the standard level for the selected menu or badge option without notice.
- All other existing product arrangements will be retained, including advice fee arrangements. Changes to advice fee arrangements should be managed online through your adviser.
- For members who joined the Asgard Independence Plan Division Two Super Fund prior to 31 March 2004, going forward their fees will be calculated and deducted as set out in the Panorama Super Product Disclosure Statement (or any subsequent communication) and therefore the fee caps in the Trust Deed will cease to apply.

**Note:** Generally, this form can be signed by either the account holder/s, the nominated financial adviser on the account or another person authorised to act on behalf of the account holder/s.

However, if the request involves the cancellation of a sponsored HIN, we can only accept this form if it has been signed by the account holder/s.

For more information on holding options for listed securities, refer to the relevant disclosure document.

### 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 (if applicable)

**Adviser full name**

## 2 Account details

**Account name**

**Account number**

## 3 Change request

☐ Change of Badge – **go to section 4**

and/or

☐ Change of Menu – **go to section 5**

DEC-1-BTF34047

# Change of account menu or badge

## 4 Change of Badge (if applicable)

**Current Badge**

**New Badge**

## 5 New Menu (if applicable)

☐ Full menu ☐ Compact menu ☐ Focus menu

**Note:** Focus and Compact menu is not available for Morgan Stanley Portfolio Plus accounts.

### Listed security holding option

If you are changing from the Full menu to the Compact or Focus menu, please select your existing Listed Security Holding type below, otherwise go to section 6.

☐ Nominee holdings ☐ Sponsored holdings ☐ Custodial holdings

**Note:** If listed securities are currently held as sponsored holdings, this form must be signed by the account holder/s.

## 6 Declaration & acknowledgements

### Client declarations

**Before you sign this form you should read the relevant disclosure documents. You can obtain these from your adviser (if you have one) or by contacting us.**

By signing this form, I/we acknowledge that:

- I/we have read and understood the relevant Investor Guide and Additional Information & Terms Booklet or the Product Disclosure Statement (PDS) and Additional Information Booklet for the New Badge (New Disclosure), or if I am changing menus, my Current Badge outlined in Section 4 (Current Disclosure). I/we agree to, consent to and acknowledge the terms, declarations, conditions and acknowledgements contained in the New Disclosure or Current Disclosure (as relevant) and in this form.
- If my account has any saved but not submitted investment orders, I instruct BT Portfolio Services Limited to cancel those saved orders prior to processing this form.
- 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.
- Neither BT Portfolio Services Limited, BT Funds Management Limited, Westpac Banking Corporation (Westpac) nor any other company in the Westpac group of companies stands behind or otherwise guarantees the capital value or investment performance of any investments in Panorama Investments or Panorama Super.
- Apart from any interest investors may have in Westpac term deposits, Westpac securities, the BT Cash Management Account or the BT Cash Management Account Saver acquired through the Panorama operating system, or investments issued by Westpac in which an investor's Panorama Super transaction account is invested, unless otherwise stated in the disclosure documents, investments in Panorama Investments or Panorama Super are not deposits or other liabilities of Westpac or any other company in the Westpac group of companies and investments in Panorama Investments or Panorama Super are subject to investment risks, including possible delays in repayment and loss of income and principal invested.
- If I/we have requested a Change of Badge, then in respect of the Bank account(s) and direct debit request details previously given by me/us in respect of my product:
  - I/we acknowledge that this direct debit arrangement is governed by the terms of the Direct Debit Request Service Agreement for the Current Badge and that all references in that agreement to the Current Badge will, from the date of transfer of my/our account, apply to the New Badge.
- If I joined the Asgard Independence Plan Division Two Super Fund prior to 31 March 2004, I consent to my fees being calculated and deducted as set out in the Panorama Super Product Disclosure Statement (or any subsequent communication) and acknowledge and agree that the fee caps in Trust Deed will cease to apply to me and my account.

### Adviser declarations

By signing this form, I acknowledge that:

- I am the financial adviser appointed on the Panorama account in Section 2 of this form and my appointment has not been revoked.
- My client has instructed me to submit this form on their behalf.
- If my client's account has any saved but not submitted investment orders, I instruct BT Portfolio Services Limited to cancel those saved orders prior to processing this form.
- My client has received, read and understood the relevant Investor Guide and Additional Information & Terms Booklet or the Product Disclosure Statement (PDS) and Additional Information Booklet for the New Badge (New Disclosure) or, if changing menus, their Current Badge outlined in section 4 (Current Disclosure) and agrees to, consents to and acknowledges the terms, declarations, conditions and acknowledgments contained in the New Disclosure or Current Disclosure (as relevant) and in this form.
- My client has been made aware that the change of account menu or badge may result in an increase to the fees charged to their account and agrees to proceed with the requested change.
- My client has been made aware that if they are moving from the Full menu to the Compact or Focus menu, if they have a custodial HIN for their listed securities holdings it will be cancelled.
- All information provided in this form is true and correct.



BT Portfolio Services Ltd ABN 73 095 055 208 (BTPS) operates Panorama Investments and administers Panorama Super (the Panorama Products). BT Funds Management Limited ABN 63 002 916 458 (BTFM) is the trustee and issuer of Panorama Super, which is part of Asgard Independence Plan Division Two ABN 90 194 410 365.

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# Change of account menu or badge

## 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 Client A** (Digital signature accepted)

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

- Account holder
- Trustee
- Director
- Sole director & Secretary
- Secretary
- Attorney
- Parent
- Financial Manager
- Other (specify below)

## Client B (if applicable)

**First name** **Last name**

**Signature Client B** (Digital signature accepted)

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

- Account holder
- Trustee
- Director
- Secretary
- Other (specify below)

## Client C (if applicable)

**First name** **Last name**

**Signature Client C** (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**

**Advisers:** Service requests > Submit new request > Account maintenance

**Investors:** Forms & requests > Submit new request > Account maintenance

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

email: professional@panorama.com.au