BT Panorama

Issued August 2026

Super account closure – rollover to an SMSF

Use this form to:

Rollover your entire superannuation benefit from your super or pension (including transition to retirement) account to a Self-Managed Super Fund (SMSF). This will result in your account being closed, and if you hold an existing Holder Identification Number (HIN) your HIN will be cancelled.

Do not use this form if you wish to request a:

- Full withdrawal or rollover to a non-SMSF super fund - complete the 'Super account closure – full withdrawal or rollover to a super fund' form.
- Partial withdrawal or rollover - complete the 'Partial withdrawal or rollover to a super fund' or 'Partial rollover to an SMSF' form, as relevant to your request type.
- Transfer between phases of your Super accounts - complete the partial or full transfer within Panorama Super or BT Super Invest form, as relevant to your request and account type.
- Transfer to a KiwiSaver scheme or to request a lump sum payment because you:
  - Have a terminal medical condition
  - Are permanently incapacitated
  - Satisfy severe financial hardship conditions
  - Satisfy compassionate grounds conditions
  - Were a temporary resident and have departed Australia
  - Were a lost member who is now found and your account
  - balance is less than $200
  - Wish to access restricted non-preserved benefits after terminating gainful employment
    If you need to close your account for any of the above reasons, contact Customer Relations on 1300 881 716.

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

Important information

Please ensure all investments on the account are sold down prior to submitting this form or the Administrator will sell your investments on your behalf.

Your request may be delayed where there are outstanding transactions relating to corporate actions, distributions or dividends.

As a result of closing your Super account, BT will instruct the relevant insurance providers to cancel any insurance policies being paid for through your Super account (including linked policies). The account closure request cannot be completed until we receive confirmation from the Insurer/s that insurance has been cancelled. Cancellation processes may vary between different insurance providers. If you would like to continue your insurance outside of your Super account, speak with your financial adviser or contact your insurance providers directly to discuss your options prior to submitting this form.

Temporary residents can generally only access their preserved super benefi s if they become permanently incapacitated, have a terminal medical condition, or have departed Australia permanently and their visa has ceased. If you are a temporary resident, refer to the Panorama Super or BT Super Invest Additional Information Booklet for further information or contact your financial adviser or Customer Relations on 1300 881 716.

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/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.

Consent Request

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 a record of your personal information that is contained in your identification documents under the Anti-Money Laundering and Counter Terrorism Financing Act 2006 (Cth).

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

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1 Adviser details (if applicable)

Dealer group name

Adviser full name

2 Member details

First name

Last name

Account Type

☐ Super ☐ Pension (including transition to retirement)

Account number

Residential address (cannot be a PO Box)

Suburb **State** **Postcode**

Tax file number (TFN)

You are not obliged to provide us with your Tax File Number (TFN). However, providing us with your TFN gives you advantages which may not apply if you choose to withhold your TFN, as detailed in Section 11 of our Privacy Statement. Please contact the Australian Taxation Office for more information about your TFN and its use.

Any details you do provide us (including your TFN) that are personal information will be collected, used and disclosed in accordance with our Privacy Statement (in particular please see Section 11 as regards TFNs) which is available at https://www.bt.com.au/personal/help/privacy/privacy-statement.html or by calling us on 132 135.

Note: Your TFN is required for a rollover to a SMSF. It is not mandatory to provide your TFN, but if you do not, the rollover to a SMSF will be rejected.

3 Rollover details

Your withdrawal benefit (less fees and taxes) will be rolled over to your nominated SMSF. All your investments must be sold in order to process the rollover. If your investments are not sold, the Administrator will sell these for you.

Would you like your rollover to be processed as one payment?[1]

☐ **Yes.** I instruct BT to selldown assets immediately avaiable. I instruct BT to not commence processing my rollover until all required funds have been received in cash.

☐ **No.** I acknowledge that, BT must provide me with a rollover payment within 3 business days of the final redemption, or in limited circumstances 30 days. If there are any pending monies after the initial rollover, and additional rollover will be made.

[1] If no election is made, we will default to make a rollover payment to you within 3 business days of the final redemption, or in limited circumstances 30 days, and any remaining amounts will be paid in additional rollovers.

SMSF details

Fund name

Fund address

Suburb **State** **Postcode**

Electronic Service Address (ESA) Alias

Fund ABN

SMSF bank account details

Note: We need your bank account details for this rollover to proceed. This account may be with any Australian bank, building society or credit union. You must also provide a copy of a bank statement issued within the last 3 months, confirming your SMSF BSB and account number. The requirement to provide a certified copy of a bank statement is not applicable if you are transferring to an SMSF which invests through the BT Panorama investment platform.

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Name of financial institution

BSB number **Account number**

SMSF account name

4 Insurance and account closure

Note: read this section if you have insurance that is attached to (either held through or linked to) your super account.

Closing your Super account will automatically cancel any insurance policies being paid for through your Super account (including all linked policies). If you want your insurance to continue you will need to leave sufficient balance in your account to fund future premiums. This information is intended as a guide only and does not constitute advice.

If you would like to continue your insurance outside of Super, speak with your financial adviser or contact your insurance providers directly to discuss your options prior to submitting this form and closing your account.

5 Personal tax deduction notice or contribution splitting application

For accounts in accumulation phase only.

Do you wish to claim or vary a tax deduction on personal contributions or apply to split contributions with an eligible spouse made in the current or previous financial year?

Important: you can *only* select one option below.

☐ I do not intend to claim or vary a tax deduction for personal contributions made to my account or apply to split contributions with an eligible spouse prior to this withdrawal.

☐ I intend to claim or vary a tax deduction for personal contributions made to my account or apply to split contributions with an eligible spouse prior to this withdrawal.

Important:

- A deduction notice can be completed or varied online at www.panoramainvestor.com.au.
- If you do not complete a personal tax deduction notice or contribution splitting application before you withdraw your full account balance, you will not be able to claim a tax deduction for any personal contributions made to your super account prior to your withdrawal or apply to split contributions with a spouse. Following your withdrawal, you will also be unable to vary any previous deduction notices you may have provided.
- If section 5 is not completed, you confirm you have already claimed or do not intend to claim a personal tax deduction notice for these contributions or split contributions with an eligible spouse.

6 Proof of identify

Select the type of identity documents you are providing

☐ I have attached a certified copy of my primary photographic identification document.

or

☐ I have attached certified copies of both:

- A primary non-photographic identification document, and
- A secondary identification document

Note: TFN is required for rollovers to an SMSF.

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7 Declaration & acknowledgment

I agree that all information provided in this form is true and correct. Additionally:

- I acknowledge that BT will request the cancellation of all insurance policies attached to my super account upon receipt of this form, including all linked policies held outside of my Panorama Super account.
- I am aware I may ask for information about any fees or charges that may apply, or any other information about the effect this rollover may have on my benefits, and have obtained or do not require such information.
- I understand that I will be unable to redeem any investment in a suspended fund or funds (ie a fund with suspended transaction on a full or limited basis, which may also have suspended issuing prices). However, I agree that the rollover will proceed in relation to all other investments.
- I agree that all investment holdings will be sold down prior to submitting this request to ensure funds are available in the cash account. Investment holdings not sold prior to this form being submitted will be sold by the Administrator which prevents the ability to participate in voluntary corporate actions.
- I request and consent to the rollover of superannuation as described above and authorise the superannuation provider of each fund to give effect to this rollover.
- If signing under a power of attorney, I verify that at the time of signing, I have not received notice of revocation of that power.
- 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 agree to the consents in the Privacy Statement and Consent Request Section.

Full name (please print)

Member signature
(Digital signature accepted, excluding typed signature)

Date (dd/mm/yyyy)

You can submit this form by:

email: support@panorama.com.au

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

Checklist

- ☐ Have all your investments been sold down?
- ☐ Have you provided your account details in section 2?
- ☐ Have you completed the SMSF rollover details in section 3, including the SMSF address and ABN required for a rollover to an SMSF?
- ☐ Have you signed and dated this request in section 7?
- ☐ Have you attached certified proof of identity documents?
- ☐ Have you attached certified proof of SMSF bank account details?

Completing proof of identity

Please refer to the following link

https://www.bt.com.au/content/dam/public/panorama/pdf/BT_Panorama_-_How_to_certify_documents_flyer.PDF
which will assist you in how to provide certified identification.

Your identification documents may be verified by the fund through an electronic service provided by the Government of Australia.

Have you changed your name or are you signing on behalf of another person?

If you have changed your name or are signing on behalf of the applicant, you need to provide a certified linking document. A linking document is a document that proves a relationship exists between two (or more) names.

The following table contains information about suitable linking documents.

Purpose	Suitable linking documents
Change of name	Marriage certificate, deed poll or change of mane certificate from the Births, Deaths & Marriages registration office
Signed on behalf of the application	Guardianship papers or power of attorney

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