

Account set up and permissions for migrating Wrap accounts

i Use this form to:

Elect to keep or update your existing account setup and client permissions.

You can type directly into the form and print before signing, or print then complete in block letters. Each applicable section of the form must be completed for this request to be processed. If you hold more than one account, you will need to complete a separate form for each account held.

Important information

Updating your existing account set up and client permissions

Updating your existing account setup and client permissions to allow each signatory to operate individually on a joint / company account. This will allow each of you to provide instructions to transact online on your Panorama Investment account following the migration of your Wrap account to Panorama, without the need for the other to also approve the instruction.

You can elect to update your account set up and client permissions by selecting 'Yes' in section 2. of this form. This will result in each signatory being set up with full transact online capability upon registration on Panorama, and the account set up will change so that either client can transact on this account individually. The full transact online capability will also allow each person to add and remove billers and Pay Anyone accounts, make payments to billers and Pay Anyone accounts as well as make payments and deposits to linked accounts.

If your account type is a joint account, these updates will be applied to your current Wrap account effective from the time this form is processed and will be carried over to Panorama on migration. If your account type is a company account, the update will be only implemented after the account has migrated to Panorama.

Keeping your existing account set up and client permissions

If you elect not to update your account set up and client permissions by selecting 'No' in section 2. of this form, all requests would be required to be manually signed by both persons (in accordance with your current account set up) for any transaction, amendment or trade executed on this account, and neither client will be provided with the ability to submit instructions or make changes online on Panorama (referred to as 'online transact capability').

BT privacy policy

The information collected on this form is governed by the BT privacy policy, which is available online at www.bt.com.au. You should read this policy before completing this form. This policy is reviewed and may be amended from time to time.

1 Your account details

Account number

2 Your account set up & client permissions

Do you elect to update your account set up to *either client to be the signatory?*

Yes No

3 Your name and contact details

Client 1

Full name

Email address

Mobile phone number



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Client 2

Full name

Email address

Mobile phone number

Note: if more than 2 clients are associated with the accounts, please attach additional pages with the clients' details.

4 Authorisation & acknowledgments

By signing this form, you agree that all information provided in the form is true and correct, and you agree to the following terms and conditions:

If you elected to update your account set up to "either client to be the signatory" by selecting 'Yes' in section 2 of this form, you agree and acknowledge that:

- each person will be set up with full transact online access upon registration on Panorama.
- the account set up will change so that either client can transact on this account without the need for the other to also approve the instruction.
- the full transact online capability will allow each person to add and remove billers and Pay Anyone accounts, make payments to billers and Pay Anyone accounts as well as make payments and deposits to linked accounts without the need for the other to also approve the change or payment.
- if your account type is a joint account, these updates will be applied to your current Wrap account effective from the time the form is processed and will be carried over to Panorama on migration.
- if your account type is a Company account, the update will be only implemented after the account has migrated to Panorama.

If you elected not to update your account set up and client permissions by selecting 'No' in section 2. of this form, you acknowledge that:

- all requests will be required to be manually signed (in accordance with your current account set up) for any transaction, amendment or trade that is required to be executed on this account.
- neither person will be provided online transact capability.

Signature of authorised person/s

The below section needs to be signed in accordance with your current account set up.

For company signatories, two directors or a director and a company secretary must sign. 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.

Client 1

Full name

Signature

Date (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other (specify below)

Client 2

Full name

Signature

Date (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other (specify below)



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Client 3

Full name

Signature

Date (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other (specify below)

Client 4

Full name

Signature

Date (dd/mm/yyyy)

Account holder

Trustee

Director

Secretary

Other (specify below)

You can submit this form by:



email: support@panorama.com.au
mail: BT Panorama,
GPO Box 2861, Adelaide SA 5001



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