



Change of Details/Withdrawal/Switch Form

New Zealand Client Services ☎ 0800 800 661 (8.30am – 5.30pm Mon – Fri New Zealand time)

Complete this form using **black pen** – print in clear **CAPITAL LETTERS**

1. INVESTOR DETAILS

If you have more than two joint investors or trustees, please photocopy this form and use it to supply additional investor details (section 1) and signatures (section 9).

BT Investor number

C

PLEASE NOTE, THIS INFORMATION IS TO BE AS PER YOUR INITIAL APPLICATION FORM.

INVESTOR A

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

/ /

INVESTOR B

Title

Mr Mrs Miss Ms Other

Given name(s)

Surname

Date of birth (dd/mm/yyyy)

/ /

2. TYPE OF REQUEST

Cross [X] the relevant box.

New address	<input type="checkbox"/> Go to sections 3 and 9
New distribution instructions	<input type="checkbox"/> Go to sections 4, 8 and 9
Change instructions for	<input type="checkbox"/> Regular Investment Plan or Flexi Payment Plan <input checked="" type="checkbox"/> Go to sections 5 and 9

Switch	<input type="checkbox"/> Go to sections 6 and 9 – a new Application Form may need to be completed
Withdrawal	<input type="checkbox"/> Go to sections 7, 8 and 9
New bank account details for	<input type="checkbox"/> Distribution <input checked="" type="checkbox"/> Go to sections 8 and 9 <input type="checkbox"/> BT Link withdrawals <input checked="" type="checkbox"/> Go to sections 8 and 9 <input type="checkbox"/> Regular Investment Plan <input checked="" type="checkbox"/> Complete new Direct Debit Request and section 9 <input type="checkbox"/> BT Link additional investments <input checked="" type="checkbox"/> Complete new Direct Debit Request and section 9
New financial adviser	<input type="checkbox"/> Go to sections 5 and 9

3. NEW ADDRESS DETAILS

State Postcode

Country, if not Australia

Home phone number ()

Mobile phone number

Fax number ()

Work phone number ()

Email address*

* In the future, BT may elect to email correspondence to you.

4. NEW DISTRIBUTION INSTRUCTIONS

Cross [X] one.

Pay by A\$ cheque to address on file or provided in section 3

Pay to bank account in section 8

Reinvest

Pay to BT Cash Management Trust¹

¹ You must be a BT Cash Management Trust Investor to have your distributions from other Investment Options paid into the BT Cash Management Trust. The BT Cash Management Trust is offered in the BT Investment Funds PDS.

5. NEW REGULAR INVESTMENT PLAN INSTRUCTIONS, FLEXI PAYMENT PLAN INSTRUCTIONS OR NEW FINANCIAL ADVISER DETAILS

Provide details below

6. SWITCH INSTRUCTIONS

Not applicable for BT Premium Cash Fund. Note: Please read the Warning Statement on page 4 before switching.

Do I need to complete a new Application Form? Call New Zealand Client Services toll free on 0800 800 661.

Switch by redemption/repurchase¹ my fund(s) as follows:

Distribution option²

Switching FROM (fund/s)	Switching TO (funds/s)	All	A\$	Units	Reinvest	Pay to bank	Pay to BT Cash Mgt Trust
		<input type="checkbox"/> ←OR→		←OR→	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> ←OR→		←OR→	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/> ←OR→		←OR→	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

¹ Delete either redemption or repurchase. If no option selected, repurchase will be the default method of withdrawal used.

² Only complete if you have no current investment in the fund being switched to.

7. WITHDRAWAL INSTRUCTIONS

Redeem/Repurchase¹ my fund(s) as follows:

Withdrawal FROM (fund/s)	All	A\$	Units
	<input type="checkbox"/> ←OR→		←OR→
	<input type="checkbox"/> ←OR→		←OR→
	<input type="checkbox"/> ←OR→		←OR→

Pay to bank account in section 8 Post A\$ cheque to address held on file Post A\$ cheque to address in section 3

¹ Delete either redeem or repurchase. If no option selected, repurchase will be the default method of withdrawal used.

8. NEW BANK ACCOUNT DETAILS

For distributions For BT Link withdrawals For withdrawal request in section 7

Bank account must be in the name of the BT investment.

If payment being made to a **New Zealand bank account** complete this section.

Name of financial institution

Branch name

Bank	Branch	Account number	Suffix

Name appearing on bank account

If payment being made to an **Australian bank account** complete this section.

Name of financial institution

Branch name

BSB number	Account number

Name appearing on bank account

9. DECLARATION AND SIGNATURES

All investors/Authorised representatives/Authorised attorneys must sign and date this form.

Signature

Date (dd/mm/yy)

Signatory name *(please print)*

Signature

Date (dd/mm/yy)

Signatory name *(please print)*

Sign as per original Application Form. If signing under Power of Attorney, the attorney is verifying that at the time of signing, you have not received notice of revocation of that power, the investor you are attorney for has received, read and understood the relevant current BT Investment Funds, BT Classic Investment Funds, BT Premium Cash Fund or BT Investor Choice offer document and you (the attorney) make any acknowledgements/representations to be made by attorneys in the current relevant offer document. Please provide a certified copy of the Power of Attorney, if not already provided to BT.

I/We acknowledge: investments in the funds are not investments, deposits or other liabilities of Westpac Banking Corporation, BT Funds Management (NZ) Limited, BT Funds Management Limited, Westpac Financial Services Limited or member companies of the Westpac Group; investments in the funds are subject to investment and other risks, including possible delays in payment of withdrawal proceeds in some circumstances and loss of income and principal invested; none of Westpac Banking Corporation, BT Funds Management (NZ) Limited, BT Funds Management Limited, Westpac Financial Services Limited or any member of the Westpac Group stands behind or otherwise guarantees (either partially or fully) the capital value or the investment performance or returns of the funds available in the relevant current offer document.



BT Investment Funds
BT Classic Investment Funds
BT Premium Cash Fund
BT Investor Choice
Warning Statement

Please note – this information does not form part of the relevant Product Disclosure Statement (the ‘offer document’). A copy of the Product Disclosure Statement is available from the responsible entity online or upon request, free of charge and should be read before making any decision to invest by completion of the application form or switch form.

WARNING STATEMENT

(a) This offer to New Zealand investors is a regulated offer made under Australian and New Zealand law. In Australia, this is Chapter 8 of the Corporations Act 2001 (Aust) and regulations made under that Act. In New Zealand, this is Subpart 6 of Part 9 of the Financial Markets Conduct Act 2013 and Part 9 of the Financial Markets Conduct Regulations 2014.

(b) This offer and the content of the offer document are principally governed by Australian rather than New Zealand law. In the main, the Corporations Act 2001 (Aust) and the regulations made under that Act set out how the offer must be made.

(c) There are differences in how financial products are regulated under Australian law. For example, the disclosure of fees for managed investment schemes is different under the Australian regime.

(d) The rights, remedies, and compensation arrangements available to New Zealand investors in Australian financial products may differ from the rights, remedies and compensation arrangements for New Zealand financial products.

(e) Both the Australian and New Zealand financial markets regulators have enforcement responsibilities in relation to this offer. If you need to make a complaint about this offer, please contact the Financial

Markets Authority, (<http://www.fma.govt.nz>). The Australian and New Zealand regulators will work together to settle your complaint.

(f) The taxation treatment of Australian financial products is not the same as for New Zealand financial products.

(g) If you are uncertain about whether this investment is appropriate for you, you should seek the advice of an appropriately qualified financial adviser.

(h) The offer may involve a currency exchange risk. The currency for the financial products is not New Zealand dollars. The value of the financial products will go up and down according to changes in the exchange rate between that currency and New Zealand dollars. These changes may be significant.

(i) If you expect the financial products to pay any amounts in a currency that is not New Zealand dollars, you may incur significant fees in having the funds credited to a bank account in New Zealand in New Zealand dollars.

(j) The dispute resolution process described in the offer document is available only in Australia and not available in New Zealand.

