BT Financial Group

Westpac

BT Margin Lending
Westpac BlueChip20 – Regular Gearing and Investment Form

Use this form to manage changes to your regular direct debit amount and investment amount for a Westpac BlueChip20 account only.

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

QUESTIONS?

If you are a direct investor:
- call BT Customer Relations Consultants on 1800 816 222, or
- email us at client.marginlending@btfinancialgroup.com.

If you are a financial planner:
- call BT Adviser Relations on 1800 671 409
- email us at adviser.marginlending@btfinancialgroup.com.

Phone lines are available Mon – Fri from 8.00am – 6.30pm (AEST).

1. BORROWER'S DETAILS

Borrower's name(s)

Borrower's Client Code

–

Investor SMA number

S M A

2. CHANGE INVESTMENT OR GEARING DETAILS

Indicate the change you would like to make to your Westpac BlueChip20 regular gearing and investment details, and complete required information. Changes to regular gearing and direct debits must be made at least 10 days prior to the next regular gearing date. The regular gearing date is the 15th of each month, or if this falls on a non working day, then the next working day.

☐ **Change the amount direct debited each month from your nominated bank account**
Note: *this change will occur from the next regular gearing date.*

Amount

$

☐ **Make an additional investment from your margin loan into your Westpac BlueChip20 account**
Note: *the additional investment instruction will occur within three working days of receipt of this completed form.*

Amount

$

You can submit this form by:

mail BT Margin Lending
GPO Box 3917, Sydney NSW 2001

fax **This form cannot be faxed**

☐ **Change the total amount invested each month (combined direct debit amount and loan amount) to your Westpac BlueChip20 account**
Note: *this change will occur from the next regular gearing date. However, after the change, both amounts must be a minimum of $250 and the amount of your Monthly Loan Draw Down must not be greater than the amount of your Monthly Instalment Contribution.*

Amount

Direct debit monthly amount	$
Loan monthly amount	$
Total monthly investment	$

Note: *We may terminate the regular gearing arrangement at any time if we consider that a loan contribution may result in the amount outstanding under your facility exceeding either your borrowing limit or your credit limit.*

3. SUSPEND REGULAR GEARING

☐ **Suspend Regular Gearing for up to three months**
Note: *this is always on 15th of each month, or if this falls on a non-working day, then the next working day.*
If no recommencement date is specified, the regular direct debit and investment will recommence three months from the cessation date.

		Month	Year
Cease regular gearing from*	1 5	/	/
Start regular gearing from	1 5	/	/

** Stops your direct debit and investment for the period, including months indicated.*

4. SIGNING SECTION

For Company or Company Trustee, or Borrowers, either two Directors, or one Director and the Secretary, or the Sole Director and Secretary must sign. Please indicate your company capacity by marking the appropriate box below your signature.

Signature of **Borrower**

Date (dd/mm/yy) / /

Signatory's full name *(please print)*

Director ☐ Sole Director/Sole Secretary ☐

Signature of **Additional Borrower**

Date (dd/mm/yy) / /

Signatory's full name *(please print)*

Director ☐ Company Secretary ☐