

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 <u>adviser.marginlending@btfinancialgroup.com</u>.

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

1. BORRO	WER'S DETAILS
Borrower's n	ame(s)
Borrower's C	lient Code
nvestor SMA	number
S M A	
2. CHANG	E INVESTMENT OR GEARING DETAILS
egular gear nformation. nade at leas egular geari non working	ing and investment details, and complete required Changes to regular gearing and direct debits must be at 10 days prior to the next regular gearing date. The ng date is the 15th of each month, or if this falls on a day, then the next working day.
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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
Vear

			WIOTILIT	icai
Cease regular gearing from*	1	5 /	/	
Start regular gearing from	1	5 /	/	

4. SIGNING SECTION

Director

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	\neg
	Date (dd/mm/yy)
	/ /
Signatory's full name (please print)	

Sole Director/Sole Secretary

ignature of Additional Borrower	7
	Date (dd/mm/yy)
	/ /

Signatory's full name (please print)

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