



Use this form to advance funds out of your BT Margin Loan.

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](mailto:client.marginlending@btfinancialgroup.com).

#### If you are a financial adviser:

- call BT Adviser Relations on 1800 671 409
- email us at [adviser.marginlending@btfinancialgroup.com](mailto:adviser.marginlending@btfinancialgroup.com).

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

### 1. BORROWER'S DETAILS

Borrower's name(s)

Borrower's Client Code

### 2. CASH ADVANCE INSTRUCTIONS

Amount of cash advance

\$

Please select how you would like this amount paid.

- Pay by direct credit to my bank account. Please also complete sections 3 and 5 of this form.

**Note:** At least one of the account holders must be a borrower on the BT Margin Loan.

- Pay by cheque. Please also complete sections 4 and 5 of this form.

**Note:** Where third party cheques are requested, they can ONLY be issued for investment purposes ie cheques can only be made payable to relevant Fund Managers, Stockbrokers or Share Registries.

- Redeem this amount from my Cash Management Trust. Please also complete section 5 of this form.

### 3. DIRECT CREDIT

Name of financial institution

Branch name

BSB number

Account number

Bank account name(s)

If you nominate a Westpac Banking Corporation (WBC) account, and we receive your instructions by 2.30p.m. (Sydney time) on a business day, BT Margin Lending can complete the transaction by 8.00a.m. (Sydney time) the following business day. If you are using other financial institutions, your requested transaction may take up to 36 hours.

### 4. CHEQUE DETAILS

Make cheque payable to:

- Borrower(s)

**(Cheque will be sent to address on file)**

- Third party payee

**(Fund Managers, Stockbrokers and Share Registries only)**

Name of third party payee

Mailing address

  
  
 State  Postcode

### 5. SIGNING SECTION

For Company or Company Trustee, Borrowers or Third Party Security providers, 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.

I/we confirm that the proceeds of the cash advance will only be used for business or investment purposes other than to purchase, renovate or improve residential property.

Signature of **Borrower**

Date (dd/mm/yy)

Signatory's full name (please print)

**Company Officer:** please indicate company capacity

- Director  Sole Director/Sole Secretary

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BT USE ONLY

Signature of Additional Borrower

Date (dd/mm/yy)


Signatory's full name *(please print)*

**Company Officer:** please indicate company capacity

Director  Company Secretary

**You can submit this form by:**

 mail BT Margin Lending  
GPO Box 3917,  
Sydney NSW 2001

 fax (02) 9274 5782