

Westpac BlueChip20

Account Opening Checklist – Advisers



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Complete and sign the following application forms:

■ Westpac BlueChip20 – Margin Lending Application

- Ensure signatures are witnessed and dated
- Trusts – Certified copy of the Trust deed and the Solicitors Trust Opinion
- Direct debit request – includes the initial and regular investment instructions
- Proof of identity documents or details
- Verification of Income documentation is attached

■ Westpac BlueChip20 – Investment Application

Part 3 – Adviser and Nominated Representatives

- Adviser code – Advisers need to register for an adviser code through westpac.com.au/bluechip20

Part 4 – Fees must be completed prior to investor signature, if this is incomplete a delay in application approval and investment will result.

- Adviser Service Fee – enter an amount up to 1.1%
- Dealer Group Service Fee – does not apply to Advised clients. Please cross out

Dealer Group Service Fee Percentage
(Up to 0.825% including GST)



BT Margin Lending will complete the Investor Identification Form using details supplied in the Westpac BlueChip20 Margin Lending Application

How to certify:

The certifier must

- Write the following on each document: "I certify that this is a true and correct copy of the original"
- Sign and date the copy
- Add their name in block capitals along with their position, and if relevant, their ID number
- The certified copy must be original (no photocopy of certifier's signature)

People entitled to certify documents:

- an officer with 2 or more continuous years of service with one or more financial institutions (for the purposes of the Statutory Declaration Regulations 1993);
- a magistrate;
- a judge of a court;
- a chief executive officer of a Commonwealth court;
- a police officer;
- an agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public;
- a person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described);
- a member of the Institute of Chartered Accountants in Australia, CPA Australia or the National Institute of Accountants with 2 or more years of continuous membership;
- a justice of the peace;
- a notary public (for the purposes of the Statutory Declaration Regulations 1993).

Mail your completed original Westpac BlueChip20 Investment Application and Margin Lending Application forms to:

- BT Margin Lending
GPO Box 3917
SYDNEY NSW 2001

Advisers need to supply Proof of Identity information if they are an Authorised Representative on the loan.

