

Westpac BlueChip20

Account Opening Checklist – Clients investing without an Adviser

Complete and sign the following application forms:

Westpac BlueChip20 - Margin Lending Application

Ensure signatures are witnessed and dated

Company and Company Trusts – cheque for \$200

Trusts – Certified copy of the Trust deed and the Solicitors Trust Opinion

Direct debit request – include 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 Representative

In order to invest using the SMA structure, you require a nominated representative.

Given names – enter “BTML”

Surname – enter “BlueChip20 Customer Service”

Dealer Group – enter “BT Margin Lending”

Adviser Code/Number – enter “BTML”

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 “NO ADVISER”

Dealer Group Service Fee – enter “0.825%”

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



Westpac BlueChip20

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 certifiers 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.

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

- BT Margin Lending
GPO Box 3917
SYDNEY NSW 2001