



PHONE 1300 661 577

Apply

## Essentials

### Choice of 59 investment managed funds from 19 different investment managers

- Suits smaller investors who want the easy administration benefits of a wrap account with access to 59 managed funds
- Minimum initial investment of \$5,000 or \$2,000 with an investment plan of \$100 per month
- Arrange insurance via the wrap platform – Term Life, Total and Permanent Disability, Living (Trauma) and Income Protection Insurance
- Consolidated reporting makes it easier to manage your investments and tax
- 24 hour access to account information via phone or internet
- Flexible and tax effective cash account that pays a competitive interest rate.

For further details or to contact a [Westpac Financial Planner](#).

### Things you should know

BT Portfolio Services Ltd ABN 73 095 055 208 (BTPS) operates BT Portfolio Wrap. An IDPS Guide is available for BT Portfolio Wrap Essentials and can be obtained from a Westpac Financial Planner. You should obtain and consider the IDPS Guide before making a decision whether to acquire or to continue to hold or dispose of interests in BT Portfolio Wrap Essentials. Essentials. BTPS's Financial Services Guide can be downloaded or obtained by contacting a Westpac Financial Planner, calling BTPS on 1300 661 577 or visiting [www.bt.com.au](http://www.bt.com.au).

Apart from any interest investors may have in underlying bank accounts held at Westpac Banking Corporation ABN 33 007 457 141 (the Bank) through a Wrap Cash Account, an investment in, or acquired using BT Portfolio Wrap Essentials is not an investment in, deposit with or any other liability of the Bank or any other company in the Westpac Group. It is subject to investment risk, including possible delays in repayment of withdrawal proceeds and loss of income and principal invested. The Bank is not the issuer of BT Portfolio Wrap. Neither the Bank nor any other company in the Westpac Group stands behind or otherwise guarantees the capital value or investment performance of any investments in, or acquired through, BT Portfolio Wrap Essentials.

Westpac Financial Planners are representatives of Westpac Banking Corporation, AFSL No 233714.



<http://www.westpac.com.au/personal-banking/investments/wrap-products/bt-wrap-portfolio-essentials/>

This information does not take your circumstances into account. Read the relevant Product Disclosure Statements or other disclosure documents before making a decision. Unless otherwise specified, the products and services described on this website are available only in Australia from Westpac Banking Corporation ABN 33 007 457 141 AFS Licence No. 233714. Conditions and fees apply.

---

## Links

- > <http://www.westpac.com.au/personal-banking/investments/wrap-products/bt-wrap-portfolio-essentials/wrap-essentials-apply/>
- > Adobe Acrobat Reader  
<http://get.adobe.com/reader/>
- > online PDF conversion tools  
[http://www.adobe.com/products/acrobat/access\\_onlinetools.html](http://www.adobe.com/products/acrobat/access_onlinetools.html)
- > Westpac Financial Planner  
[https://forms.westpac.com.au/Forms/single\\_page\\_forms.nsf/f\\_appointmentInvestSuper?OpenForm&referrer=http%3A%2F%2Fwww.westpac.com.au%2Fpersonal-banking%2Finvestments%2Fwrap-products%2Fbt-wrap-portfolio-essentials%2Fbtportfolio-wrap-essentia-essent%2F%3Fview%3DStandard](https://forms.westpac.com.au/Forms/single_page_forms.nsf/f_appointmentInvestSuper?OpenForm&referrer=http%3A%2F%2Fwww.westpac.com.au%2Fpersonal-banking%2Finvestments%2Fwrap-products%2Fbt-wrap-portfolio-essentials%2Fbtportfolio-wrap-essentia-essent%2F%3Fview%3DStandard)
- > www.bt.com.au  
<http://www.bt.com.au>



<http://www.westpac.com.au/personal-banking/investments/wrap-products/bt-wrap-portfolio-essentials/>

This information does not take your circumstances into account. Read the relevant Product Disclosure Statements or other disclosure documents before making a decision. Unless otherwise specified, the products and services described on this website are available only in Australia from Westpac Banking Corporation ABN 33 007 457 141 AFS Licence No. 233714. Conditions and fees apply.