

# BT Margin Lending

## Westpac BlueChip20 – Additional Investment Form

Use this form to make additional investments in the Westpac BlueChip20. BT Margin Lending will transfer a specified sum to your Westpac BlueChip20 account. The additional investment will occur on the next available date for investment, once the funds have been received. **Note: The minimum additional investment amount is \$500.**

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 planner:

- 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 (AEST).

### 1. BORROWER'S DETAILS

Borrower's name(s)

  
  
  


Borrower's Client Code

Investor SMA number

**S M A**

### 2. ADDITIONAL INVESTMENT INSTRUCTIONS

You can choose to instruct BT Margin Lending to debit a specified amount from your nominated bank account and also draw down funds from your loan for a total investment amount.

	Amount
<input type="checkbox"/> <b>Debit the nominated bank account for a one off amount</b> The amount specified will be debited from your nominated bank account	\$
<input type="checkbox"/> <b>Draw down my Westpac BlueChip20 Margin Loan</b> The amount specified will be drawn from your margin loan. This will increase your loan balance.	\$
<b>Total additional investment</b>	\$

**Note:** The amount drawn from your margin loan is subject to approval, you must have sufficient funds available for the total additional investment amount.

### 3. SIGNING SECTION

The borrower/s is/are required to sign this form.

For Company or Company Trustee account holders, 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 **Bank Account Holder 1**

Date (dd/mm/yy)

 /  / 

Signatory's full name (please print)

Director  Sole Director/Sole Secretary

Signature of **Bank Account Holder 2**

Date (dd/mm/yy)

 /  / 

Signatory's full name (please print)

Director  Company Secretary

#### You can submit this form by:

- mail BT Margin Lending  
GPO Box 3917, Sydney NSW 2001
- fax **This form cannot be faxed**