## **\$BT**

# Westpac BlueChip20 Investment and Margin Loan Termination form BT Margin Lending

Complete this form to payout and/or terminate your Westpac BlueChip20 investment and margin loan accounts. You have three options to terminate your investment account:

- · Full sale of security; or
- · Full transfer of security; or
- Partial transfer and sale of security.

You are required to repay your margin loan in full, including any accrued interest.

**Note:** if there is a corporate action affecting any of the securities in your account at the time you wish to close the account, the process to finalise the transfer or sale of those securities may be delayed until the corporate action is closed.

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 <u>client.marginlending@btfinancialgroup.com</u>

## If you are a financial planner:

- Please call BT Adviser Relations on 1800 671 409, or
- Email us at adviser.marginlending@btfinancialgroup.com

Phone lines are available Mon-Fri from 8.00am to 6.30pm (AEST).

. BORROWER'S DETAILS
rrower's name(s)
rrower's Client Code
vestor SMA Number
S M A
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## COMPLETE <u>EITHER</u> SECTION 2 OR 3 OR 4

- Section 2 If you want to sell <u>all</u> securities held in your Westpac BlueChip20 account.
- Section 3 If you want to transfer/release <u>all</u> securities held in your Westpac BlueChip20 account.
- **Section 4** If you want a <u>partial</u> transfer/release of securities held in your Westpac BlueChip20 account.

## 2. FULL SALE OF SECURITY AND PAY PROCEEDS TO MARGIN LOAN

Sell <u>all</u> stock held in my Westpac BlueChip20 account and apply the proceeds of the sale to settle the loan.

**Note:** If there is a loan balance remaining after stock is sold, you must repay the remaining loan balance prior to terminating the loan. If there is a credit balance we will credit the remaining funds to the bank account nominated on your loan.

## 3. FULL TRANSFER OF SECURITY - REPAY MARGIN LOAN

Transfer all stock held in my Westpac BlueChip20 account.

**Note:** Please call BT Customer Relations on 1800 816 222 to confirm your loan payout figure. You must repay your loan before shares can be transferred.

## MARGIN LOAN REPAYMENT – MUST BE REPAID PRIOR TO TRANSFER OF SECURITY

Please indicate how you intend to repay your loan.

- Please debit my nominated bank account on file.
- I will arrange payment by direct credit, or BPAY®. (You will need to arrange this with your financial institution).

### SPECIFY DETAILS FOR THE TRANSFER OF SECURITY

Please indicate the type of sponsorship you would like to transfer your stock to, (either issuer sponsored or to your HIN):

- SRN Issuer Sponsored. Note: This is the default option if you do not enter a HIN.
- HIN Broker sponsored, complete details below. If you do not have a HIN one will be created for you.

## HIN (BROKER SPONSOR) DETAILS

Please transfer stock held in my Westpac BlueChip20 account to my HIN (enter number below)

Holder Identification Number (HIN)

Stockbroker or other CHESS Sponsor name

Stockbroker account number

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	. SALE AND TRANSFER OF	F SECURITY -	- REPAY	5. CHANGE SMA BANK ACCOUNT – MANDATORY
MARGIN LOAN  Transfer the securities indicated below and sell the remaining				You must complete this section to authorise the change of bank
securities.				account details.  The SMA investment account will be terminated however there may
Note: The transfer of security will occur before the sale of the remaining security. First you will receive and need to complete an Australian				be remaining dividends which would currently be credited to your Westpac BlueChip20 margin loan account. As this margin loan account
	nsfer Form for each transfel need to ensure that the s		will renay the	will be closed, we request you to nominate an alternative bank account
You will also need to ensure that the sale proceeds will repay the loan balance and any accrued interest owing in full. Alternatively				for any such payments to be deposited to. By signing below, you authorise us to provide those account details to BlackRock and
you will need to make a loan repayment to cover this amount prior to the transfer of any remaining security. Please contact BT Customer				instruct BlackRock to update your bank account details on the terminating Westpac BlueChip20 investment account to this alternative
	1800 816 222 for assistan			bank account.
SPECIFY SECURITY TO BE TRANSFERRED  Specify below any securities to be transferred. Any remaining securities			ining securities	Name of financial institution
in the accou	unt will be sold and the			
margin loan.	T.			Branch name
ASX code	Share name	No. of shares	Type of sponsorship <sup>1</sup>	BSB number Account number
			HIN	BSB number Account number
			SRN	Account holder's name(s)
			HIN SRN	Account Holder 3 Harric(3)
			HIN	
			SRN	
			HIN	6. SIGNING SECTION
			SRN	For Company or Company Trustee, Borrowers or Third Party Security
			HIN	providers, either two Directors, or one Director and the Secretary or the Sole Director and Secretary must sign. Please indicate your company
			SRN	capacity by marking the appropriate box below your signature.
			SRN	Signature of <b>Borrower</b>
			HIN	Date (dd/mm/yy)
			SRN	
			HIN	Signatory's full name (please print)
			SRN	
			SRN	Company signatories must indicate their company title.  Director Sole Director/Sole Secretary
			HIN	Director Sole Director/Sole Secretary
			SRN	Signature of Additional Borrower
			HIN SRN	Date (dd/mm/yy)
1 UIN (Prok	 er Sponsored) or SRN (Issu	or Spancarad		
_ `	ate the type of sponsorshi	•		Signatory's full name (please print)
transfer your	stock, either issuer spons	ored or to you	ır HIN):	
	suer Sponsored. Note: This iter a HIN.	s is the defau	It option if you	Company signatories must indicate their company title.
HIN - Bro	oker sponsored, complete		. If you do not	Director Company Secretary
	IN one will be created for y R SPONSOR) DETAILS	ou.		Please send your completed Wstpac BlueChip20 Loan Termination Request form to:
Transfer	stock held in my Westpac	BlueChip20	account to my	
HIN (ente	r number below).			You can submit this form by:  mail BT Margin Lending
noider identi	fication Number (HIN)			GPO Box 3917
Stockhroker	or other CHESS Sponsor na	ama		Sydney NSW 2001 a fax (02) 9274 5782
J. OLOGNOI UNGI	or other offices sponsof th	uillo		email client.marginlending@btfinancialgroup.com

Once we receive this form we will send a confirmation email to the address held on your loan account.

Stockbroker account number