

# BT Margin Lending Westpac BlueChip20 – Lodging Shares Form

Use this form to lodge shares as security for your Westpac BlueChip20 portfolio. Note: You can only lodge stock that are currently listed on the Australian Securities Exchange (ASX). You will receive Australian Standard Transfer Forms (ASTF's) via your nominated e-mail address which will need to be printed signed, and the original posted as per the instructions on the ASTF's.

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:

- call BT Adviser Relations on 1800 671 409
- email us at adviser.marginlending@btfinancialgroup.com.

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

I. BURKUWER'S DETAILS	
Borrower's name(s)	
Borrower's Client Code	
	-
Investor SMA number	
S M A	
2. LODGEMENT INSTRUCTIONS	
Your shares will either be 'Issuer Sponsored' which have an SRN and will have an Issuer Sponsored State Sponsored' which means you will have a HIN (sponsor Sub Registry by your Broker). Please select from the	ment, or 'Broker red in the CHESS
ISSUER SPONSORED SHARES	
Lodge the following Issuer Sponsored shares (a your most recent Issuer Sponsored Statement).	
Note: Your personal details on your Issuer Spons must match those on the Westpac BlueChip20 a (If your details vary even slightly, your lodgeme be significantly delayed.)	account exactly?
Is your name the same on the statement and the lo	an?
Yes. Proceed to Section 3 to sign this form.	
No. Please contact the share registry directly details or complete the Name Correction and Ind form, which can be downloaded from	

## **BROKER SPONSORED SHARES**

Transfer the following broker sponsored shares from the nominated below, to BlackRock Investment Managemer investment manager for the SMA. All securities are BlackRock as the custodian).  Name of Stockbroker firm	nt (as the
Stockbroker account number	

### **SHARES FOR TRANSFER**

You must complete all fields in the table, as the purchase date and price are required for the tax reporting feature with Westpac BlueChip20. All shares held with your Westpac BlueChip20 account must be held in the same name (no Third Party Security Providers).

Note about Holding Locks: If you do not place a Holding Lock on the additional stock you lodge to your Westpac BlueChip20 account, that security will not be within the balance according to the S&P ASX Top 20 Index, therefore would be sold to rebalance the portfolio in line with the Index. Also, when you place a Holding Lock on any stock, the performance of your portfolio may be affected, and not track the performance of the S&P ASX Top 20 Index as closely.

1 SHARES FOR TRANSFER		
ASX code		
SRN/HIN		
Number of shares		
Date purchased (dd/mm/yyyy)	/ /	
Purchase price		
Holding lock	Yes No No	
2 SHARES FOR TRANSFER		
ASX code		
SRN/HIN		
Number of shares		
Date purchased (dd/mm/yyyy)	/ /	
Purchase price		
Holding lock	Yes No No	
3 SHARES FOR TRANSFER		
ASX code		
SRN/HIN		
Number of shares		
Date purchased (dd/mm/yyyy)	/ /	
Purchase price		
Holding lock	Yes No No	

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# The borrower/s is/are required to sign this form, when the shares being lodged are owned by the borrower/s. For Company or Company Trustee, or Borrowers, 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 Borrower Date (dd/mm/yy) Director Sole Director/Sole Secretary Date (dd/mm/yy) Signature of Additional Borrower Date (dd/mm/yy) Signatory's full name (please print) Director Company Secretary Tou can submit this form by: mail BT Margin Lending GPO Box 3917, Sydney NSW 2001

(02) 9274 5782

fax

3. SIGNING SECTION

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