

For eWRAP Investment accounts

Send the completed form to us via one of the following methods:

- ask your adviser to lodge it on your behalf on AdviserNET
- submit a copy via our secure Document Upload facility on Investor Online or AdviserNET (accessed from Forms > Document Upload menu)
- post to Asgard, PO Box 7490, Cloisters Square, WA 6850
- email a copy to asgardforms@asgard.com.au

If you submit using the Document Upload facility or email, you don't need to post us the original.

Questions? Call our Customer Relations team on 1800 731 812 Monday to Friday, between 8:30am and 7:00pm, Sydney time (8:00pm during daylight savings time) or email ewrap@asgard.com.au.

BT Panorama has a different integrated cash account called the BT Cash Management Account (BT CMA) issued by Westpac Banking Corporation (Westpac). On Asgard, your cash account is your eCASH or CASH Connect account and is issued by St. George Bank (a division of Westpac). The BT CMA is held by BT Portfolio Services Ltd on your behalf. However, you directly hold your eCASH or CASH Connect account (Cash Account).

This means we'll need your consent before 28 February 2026 to transfer your cash balance in your Cash Account when we move your eWRAP Investment account to BT Panorama Investments in 2026.

If you don't provide consent to transfer your cash balance in section 2 of this form, an investment drawdown will be triggered following the move to ensure the BT CMA meets the minimum cash balance for BT Panorama Investments (which is \$2,000).

For information about the BT CMA on BT Panorama Investments, read the **Terms and Conditions** (T&C's). You can access the T&C's and BT Panorama Investments disclosure documents from the client migration hub at bt.com.au/movingyouraccount.

All personal information and credit-related information we collect about you is collected, used and disclosed by us in accordance with our Privacy Statements which are available at asgard.com.au/privacy or by calling 1800 731 812 and stgeorge.com.au/privacy/privacy-statement or by calling 13 33 30, respectively. Our Privacy Statements also provide information about how you can access and correct your personal information and make a complaint. You do not have to provide us with any personal information or credit information but, if you don't, we may not be able to process your application.

Account number

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Account name

[illegible]

Do you consent to transfer the balance of your Cash Account to the BT CMA?

i Important: ensure you read the important information section on page 1 prior to making an election.

- ☐ Yes. I/we consent to the transfer of the balance of my/our Cash Account (linked to my/our eWRAP Investment account specified in section 1) to the BT CMA which will be opened on my/our behalf at the time my/our account is moved to BT Panorama Investments.
- ☐ No. I/we do not consent to the transfer of the balance of my/our Cash Account (linked to my/our eWRAP Investment account specified in section 1) to the BT CMA.



3. Acknowledgement and signature

By signing this form, I/we confirm that all information provided in the form is true and correct. I/we understand and acknowledge that:

- if I/we elected to consent to the transfer in section 2 of this form:
 - the balance in my/our linked Cash Account will transfer to my/our new BT CMA account when my/our account is moved to BT Panorama Investments, and
 - if my/our Cash Account balance, upon moving to BT Panorama Investments, is less than the BT Panorama Investments cash minimum requirement then a drawdown on my/our investments, in accordance to existing preference, will be placed to ensure the balance in the BT CMA meets the minimum cash balance for BT Panorama Investments (which is \$2,000)
- if I/we elected to not consent in section 2 of this form then an investment drawdown will be triggered following the move to ensure the BT CMA meets the minimum cash balance for BT Panorama Investments (which is \$2,000)
- I/we have read and understood the **BT CMA Terms and Conditions** and understand that there are some feature differences between the current account and the BT CMA.

If the account is in joint names, both people must sign.

Signature of: ☐ Applicant 1 ☐ Trustee 1 ☐ Director
☐ Sole Director ☐ Sole Secretary

Date

Signature of: ☐ Applicant 3 ☐ Trustee 3

Date

Signature of: ☐ Applicant 2 ☐ Trustee 2 ☐ Director
☐ Secretary

Date

Signature of: ☐ Applicant 4 ☐ Trustee 4

Date

St George Bank – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714, is the issuer of Asgard eCASH and CASH Connect. Asgard Capital Management Limited ABN 92 009 279 592 (Asgard) is the administrator of Asgard eCASH and CASH Connect, Asgard Infinity eWRAP Investment and Asgard eWRAP Investment (and badged versions).

BT Portfolio Services Ltd ABN 73 095 055 208 AFSL 233715 (BTPS) is the operator of Panorama Investments. Westpac Banking Corporation ABN 33 007 457 141 AFSL (Westpac) and Australian credit licensee 233714. Westpac is the issuer of the BT Cash Management Account (BT CMA).



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