

BT Life: Forms

Understanding the changes to BT Life forms and how to find their new equivalents in TAC.

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

From 21 August 2023, the BT Life forms you use are changing.

See the headings below for further details on which forms are changing, including where to locate the equivalent form in TAC.

Please note: The information in this factsheet is BT Life-specific and relates to the transition to TAC on 21 August 2023.

Updated Forms

The following forms no longer have the Panorama User ID field:

- BT Client Transfer to a New Adviser
- Transferring a Client to a New Adviser within the Dealer Group

The following forms have been updated to reflect the transition to TAC:

- BT Application for Continuation Option (Platform Super)
- BT Application for Children's Benefit Continuation Form
- BT Cancellation and Replacement Application
- BT Cancellation and Replacement Simple Application
- BT Application for Continuation Option (Panorama Investments)
- BT Application for Continuation Option (Panorama Super)
- Life Insurance Remuneration Frequency
- BT Application Form

Decommissioned Forms

The BT Life form below has been decommissioned and replaced with the **Australian Financial Services Licensee Application Form**, downloadable from TAC:

- Dealer Group Registration and Change of Details

See below for instructions on how to find forms and documents in TAC.

To search for a form or document in TAC:

1 Select **Search** from the TAC home dashboard.

OR

Select **Search Forms and Documents** from the left-hand panel.

2 Select the **Forms & Documents** tab (if not already selected).

3 Enter your search criteria in the search box at the top of the page.

4 Select the **magnifying glass** icon or press return to generate search results.

5 Select the **plus (+)** or **minus (-)** icons to expand or collapse the search filters panel

6 Use the radio buttons to filter by the following **Category** types:

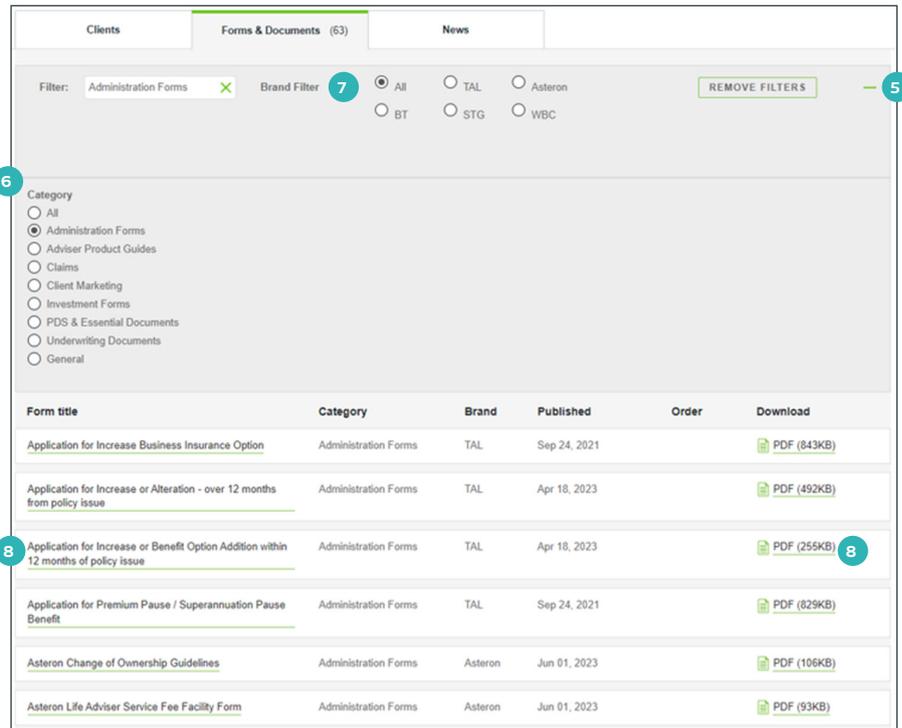
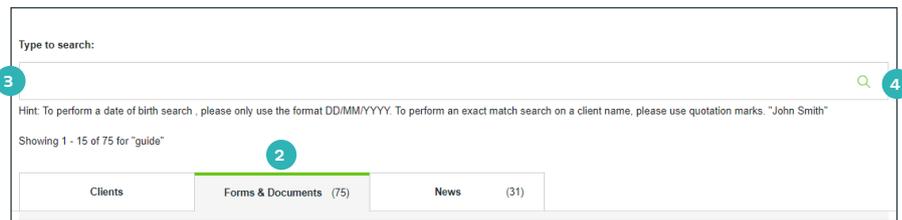
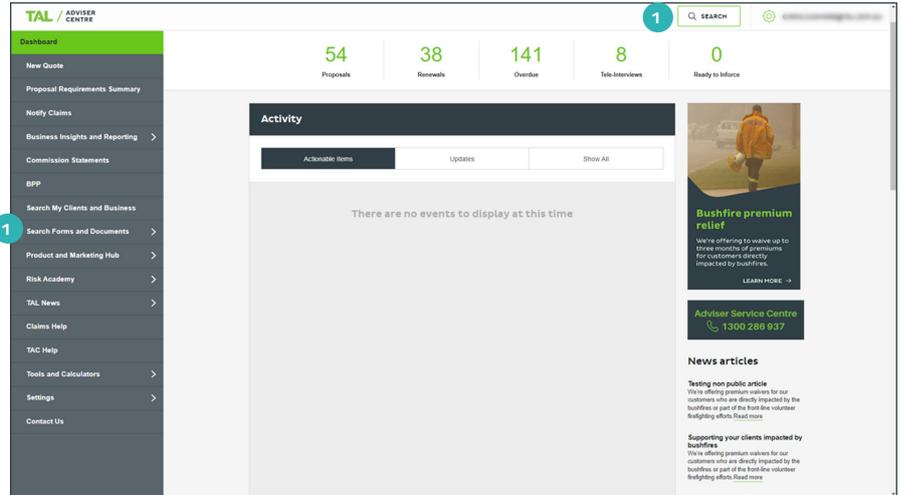
- Administration Forms
- Adviser Product Guides
- Claims
- Client Marketing
- Investment Forms
- PDS & Essential Documents
- Underwriting Documents
- General

7 Use the radio buttons to filter by **Brand**.

8 Select a **Form title** to download it.

OR

Select the **PDF** icon from the Download column next to the item.



For more information, please contact us on the details below:
TAL and Asteron - 1300 286 937 (Monday to Friday 8am - 7pm AEST)
BT Life - 1300 553 764 (Monday to Friday 8am - 6:30pm AEST)

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