

BT Adviser Charter

At BT supporting advisers is a central part of what we do and this charter outlines how we are actioning that commitment.

1

BT acknowledges and respects the adviser-client relationship

- Our platform is built with the adviser-client relationship at its core
- We will only communicate to your clients if we have a legal or regulatory obligation and will notify you beforehand.

2

BT is committed to delivering the support you need

We will deliver the following to help support your advice process through

- Technical support
- Investing in the capability of adviser facing teams to provide first class service
- Delivering help when you need it with multi-channel and digital service capability.

3

BT will proactively work with you to help you drive efficiencies and client engagement

4

BT is committed to working closely with the industry, regulators and the broader financial services sector to advocate for the value of wealth management and financial advice in Australia

5

BT shares its knowledge and insights and facilitates ongoing learning opportunities, giving advisers access to our experts and industry contacts and hearing from adviser 'peers' to create a 'Community of Choice'

- Offering over 200 hours of CPD per year via our education and engagement program.
- Using our scale to drive meaningful insights you can use to benchmark your practice or to enhance client engagement.

Important Information

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