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Dear Investor,

BT Tax Statement

As tax time approaches, we would like to provide you with information to assist you in completing your tax return. For the 2021-2022 financial year, you have not received any taxable income from your investment. As such, you will not be sent a BT tax statement.

If you switched, withdrew or transferred units during the year, you may receive a BT Capital Gains Tax Statement. This will provide a breakdown of the capital gain or loss realised on your investment that you will need to include in your tax return.

We're here to help

If you have any questions about your statement and your investment, please contact your financial adviser or call us on 132 135 (+61 2 9155 4070 from overseas) Monday to Friday, between 8:30am and 5:30pm (Sydney time). Alternatively, please contact us via bt.com.au/contact-us.

Yours sincerely,

Andrew Wallace
Managing Director, Personal & Corporate Superannuation
BT Financial Group