

CHANGE OF OWNERSHIP BUSINESS TO BUSINESS TRANSFER REQUESTS

Both parties should fill out this form and read all terms and conditions before signing. Please ensure that all information supplied is correct. Incorrect information may cause delay in processing your application.

Depending on the complexity of your application, processing times will vary. When we have received your application you will receive a confirmation email that will contain a Telstra Reference Number.

If this Change of Ownership request is for mobile services only and the Incoming Customer has been a Telstra customer for less than 6 months, this form must be submitted to your local Telstra shop for processing.

On completion this form should be scanned and emailed to change.ownership@team.telstra.com or faxed to 02 9218 5990 or returned to your local Telstra store

PART A – SERVICES TO BE TRANSFERRED

The list of services should be reviewed by both the Outgoing and Incoming Customers before submitting the application form to ensure both parties are aware of and agree to the details provided. A full list of your services and account numbers can be found on your latest Telstra bill or you can contact Telstra Business – 13 2000.

Please note removing or adding services may affect your current pricing. Please ensure you have checked your plan terms and conditions before proceeding.

You can list whole account numbers, individual services or both as below.

*Please note that a \$44/service fee applies for the transfer of 1300, 1800 and 13 numbers, which will be applied to the Incoming Customer account.

1) Do you want to transfer all services under your account to the Incoming Customer?

No – Go to option 2
 Yes – List account numbers here. All services under these accounts will be transferred.

2) Do you want to transfer individual services?

No – List account numbers above to transfer all services
 Yes – List service numbers here. Only these services will be transferred (unless part of a bundle).

Services to be transferred can include but not limited to:

- Landline services
- Mobile services
- Internet (fixed and wireless)
- BigPond Mailboxes (provide email address)

Please attach additional services on a separate sheet if required.

Services with another carrier will not be transferred.

When services in a bundle are nominated to transfer (eg Digital Office Technology (DOT), BizEssentials, Telstra Bundles etc), all services within the bundle will move to the Incoming Customer. If you wish to move individual services currently under a bundle, please contact your Dealer, Account Representative or Telstra Business on 13 2000 to discuss plan options first. Early Termination Charges (ETC) may be incurred for services still in contract.

PART A (CONTINUED)

TBS (Telstra Business System)/Phone System

Are you transferring a TBS/Phone System?

No – You may skip this section

Yes – Continue below

Is this TBS/Phone System under a Finance Contract?

No – Please provide the TBS service number here. No action will be taken on TBS/Phone Systems that have a Finance Contract.

Yes – Please read below information on how to transfer.

If the TBS/Phone System is under a Finance Contract, you will need to contact Capital Finance on **1300 133 873** to organise the transfer independently. All TBS agreements with Capital Finance repayment options are between the contract signatory and Capital Finance directly. Telstra act on behalf of Capital Finance as a third party biller and are unable to make changes to the billing details of the finance contract without their approval. Capital Finance may charge a transfer fee.

Until Capital Finance have agreed to the transfer, charges will continue to bill to the outgoing customer.

Upon Capital Finance confirming approval of the transfer to the new legal entity, Telstra will be notified directly of the new entity details and all TBS/Phone System charges (including maintenance) will be transferred to the Incoming Customer.

Finance Contracts

To confirm if there is a Finance Contract in place, refer to your Telstra bill where the reference will state "Finance Repayment to Capital".

You can find your 10 digit TBS service number on your Telstra Bill under the "Other Charges & Credits" section. It will be referenced as "Other Services".

Transfer Date

(For all services or accounts listed)

What date should the Transfer of Services take effect? / /

The Transfer Date cannot be earlier than 7 working days from the date that this form is submitted to Telstra including all required information. Telstra will attempt to transfer the services on the date you have requested, however some requests may take longer to complete.

You may nominate a date up to 30 days in the future. Otherwise, we will attempt to transfer the services within 7 working days from receipt of this form, however some requests may take longer to complete.

PART B – OUTGOING CUSTOMER

(This is the customer who currently owns the services)

Customer Name

Business or Trading Name

ACN/ABN/ARBN

Billing address

I am fully authorised to act on behalf of the Outgoing Customer

Title (Mr, Mrs etc) Full Name

Date of Birth

Phone number

Email address

We may need to send you a Final Bill at the end of this transaction. Would you like this issued to a different address than the one currently listed against your account?

No – Use above address

Yes – Provide address below

Letter of Authorisation

In addition to this form, you must also provide a Letter of Authorisation on company letterhead and signed by a Company Director or Authorised Representative. The Letter of Authorisation must include your Business Name, ABN and a Statement of Authorisation to approve the person signing this form to act on behalf of the business.

I have attached the required Letter of Authorisation to this form

Agreement – Outgoing Customer to Sign

(This is the customer who currently owns the services)

Important information

Where services cannot be retained on the same plan, ETCs may be charged.

To discuss if you will be charged an ETC as part of this transfer, please contact Telstra on 13 2000.

- MessageBank services for fixed and mobiles phones reset to the default settings when a Change of Ownership is processed. All messages and settings will be permanently deleted.
- White Pages listings cannot be transferred. You will need to contact Sensis directly to cancel your subscription.

BigPond services information:

- the Incoming Customer may be liable for all outstanding amounts on the BigPond account
- billing, payment and usage history may be visible to the Incoming Customer
- existing and newly received emails will be available to the Incoming Customer.

On behalf of the Outgoing Customer, I request that Telstra transfer the legal responsibility of the services listed above to the Incoming Customer whose details are included in Part C of this form and I acknowledge that:

- I will remain liable for all debts incurred on the services listed above prior to the Date of Transfer including any applicable ETCs;
- acceptance of this request by Telstra is subject to Telstra's ordinary credit approval process;
- I have read and understand all statements made in this application form; and

Your business information

This must be provided for validation and confirmation of your details.

Authorised Representative

Please ensure there is a number and email address you can be contacted on after the transfer has taken place.

Final Bill

If you are transferring some of the services on your account and retaining other services, you will receive your bills as per your normal billing cycle for the services you are retaining.

If you are transferring all services on your account, once the Change of Ownership has taken effect, we will send you a Final Bill for your services.

Terms and conditions

Please ensure you read all terms and conditions before signing.

- the recipient of the email address(es) associated with my services will now be able to read emails intended for me. I agree to take all necessary steps to ensure my contacts are notified of my new contact details.

I agree that I will not seek to recover any loss I have suffered or may suffer (either directly or indirectly) as a result of this transfer.

I warrant that I am authorised to make this request on behalf of the Outgoing Customer.

Full Name

Signature

Date

 / /

PART C – INCOMING CUSTOMER

(This is the customer who will be receiving the services)

Is the Incoming Customer an existing Telstra customer?

(There are Telstra services already billing in the name of the Incoming Customer).

No – Please proceed to Section 2 (Page 5)

Yes – Complete Section 1 below

Section 1 – Existing Customers

Existing Customer Account Information:

Customer Name (as per ASIC/ABN Register) – If you are unsure of these details, please refer to ASIC – asic.gov.au or the Australian Business Register – abr.business.gov.au/Index.aspx

ACN

ABN

Business or Trading Name (if applicable)

Do you want these services consolidated to an existing Telstra bill?

No – A new billing account will be created for you

Yes – Provide account number here

If you would like a new billing account created for your services, provide billing address below.

This is not needed if you have nominated an existing account above.

I am fully authorised to act on behalf of the Incoming Customer

Title (Mr, Mrs etc) Full Name

Date of Birth

 / /

Phone number

 ()

Email address

Once Existing Customer section has been completed, go to Part D (Page 7) for ID requirements.

Single Bill

If nominating an existing account for consolidation, the provided account number must already be under the ownership of the Incoming Customer.

Consolidation availability will depend on whether the services to be transferred are compatible with the requested account. If consolidation is not available, a new account will be created for you.

Section 2 – To be completed by customers new to Telstra

If you are not an existing Telstra customer, this application will be subject to a Telstra Credit Assessment.

This form will not be processed until approval has been received.

Does the Incoming Customer have an ACN?

- No – Please proceed to Section 2b
- Yes – Please complete Section 2a only

Section 2a) Company Customer Section –

To be completed only if you have an ACN. You can check the details of your ACN on the ASIC website – asic.gov.au

Company Name (as per ASIC)

ACN

ABN

Business or Trading Name (if applicable)

Will the company be acting on behalf of a Trust or Partnership?

You can check your ABN details on the ABN Register – abr.business.gov.au/Index.aspx

- No – Please continue to Business Location
- Yes – Please provide ABN for Trust/Partnership here

Business Location (must be a fixed site address; cannot be a PO Box address etc)

Level/Unit no. etc

Street address

Suburb

State

Postcode

Is your billing address the same as your Business Location?

- Yes – As above
- No – Provide billing address below

How many employees does your company employ?

This information is required for credit assessment purposes.

Once company section has been completed, go to Part D (Page 7) for ID requirements.

Section 2b) Individual Customer Section

To be completed if you're a Sole Trader or an individual who is acting on behalf of a Trust or a Partnership. You can check your ABN details on the ABN Register – <http://www.abr.business.gov.au/Index.aspx>

New Account Information:

Title (Mr, Mrs etc.) Full Name

ABN/ARBN

Business or Trading Name (if applicable)

Date of Birth

Phone number

 / / ()

Email address

Business Location (must be a fixed site address; cannot be a PO Box address etc)

Level/Unit no. etc

Street Address

Suburb

State

Postcode

Is your billing address the same as your Business Location?

Yes

No – Provide billing address below

We require some of your personal details in order to complete a credit assessment.

Your application cannot proceed if this information is not provided.

Marital Status

Single

Married/de facto

Other

No. of dependents

Current residential address (must be a fixed site; cannot be a PO Box address etc)

Level/Unit no. etc

Street address

Suburb

State

Postcode

Residential Status

Rent

Own

Other

Duration at current address

Previous address (must be a fixed site; cannot be a PO Box address etc)

Level/Unit no. etc

Street address

Suburb

State

Postcode

A Trust isn't a legal entity in its own right and can't be accepted as the sole name of the customer to a Telstra service. A trust is an arrangement under which property is handed to, or vested in, a person (trustee) to use or dispose of for the benefit of another. The trustees will be liable for all debts incurred in respect of a service. A Superannuation Fund is a type of trust, and will have a trustee. The trustee may either be an individual or a company.

A Partnership must be represented by either an individual or a company. A Partnership isn't a legal entity. It's an association of more than two people who own and control a business in common with a view to profit. Every partner is legally liable for any debts both jointly and separately. Each partner has unlimited personal liability.

Section 2b (continued)

Occupation

If you are self employed, you do not need to complete the employer information below.

Employer Name

Employer address

Phone number

Duration with current employer

Once individual section has been completed, continue to Part D for ID requirements.

PART D – INCOMING CUSTOMER AUTHORISATION & IDENTIFICATION

The person authorising this transaction must provide 100 points of ID, including primary and secondary ID, as part of this application. This is a legal requirement and must be provided for every change of ownership request for both new and existing customers.

- You will need to provide us with a copy of your ID by attaching it to this form. Examples of the Primary ID you can provide are an Australian Drivers Licence or Australian Passport. Your Secondary ID must be company ID and can include a copy of a company utility bill, rates notice or bank statement.
- For information on what ID you can provide to Telstra, including a comprehensive list of acceptable primary and secondary ID's, please see <http://support.telstra.com.au/t5/Manage-Account/Acceptable-forms-of-identification/ta-p/398098>

I have attached the required ID documentation to this form

ID type and identification number

Primary ID type (must include photo and DOB)

ie Australian Passport, Australian Drivers Licence, NSW Birth Card, Tasmanian Personal Identity Card.

Type	State of Issue	Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Secondary ID type

eg company utility bill, rates notice or bank statement

Type	State of Issue	Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Type	State of Issue	Number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Who do you want to be authorised on your account?

	Authorised Representative 1	Authorised Representative 2
Full name	<input type="text"/>	<input type="text"/>
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Contact number	(<input type="text"/>) <input type="text"/>	(<input type="text"/>) <input type="text"/>
Email address	<input type="text"/>	<input type="text"/>

Only Authorised Representatives will be able to access the account information when contacting Telstra. The Authorised Representatives will have full authority over all services and will be able to add new services to the account.

If you require more than two Authorised Representatives, please provide the details on a separate page. This must include all details as specified to the left.

AGREEMENT – INCOMING CUSTOMER TO SIGN

(This is the customer who will be receiving the services)

Important information

- Before agreeing to take over the ownership of the above services, you should satisfy yourself of the details of the services including pricing and plan information. You may want to contact the Outgoing Customer or Telstra to discuss this.
- Where services can't be retained on the same plan because those plans are no longer available or the incoming customer is not eligible, services will be transferred to standard pricing with no fixed contract term. To discuss your pricing options after the transfer has taken place please contact Telstra on **13 2000**.
- The services listed above will be transferred along with any additional products attached to those services.

On behalf of the Incoming Customer, I request Telstra transfer the legal responsibility of the services listed above from the Outgoing Customer, whose details appear in Part B of this form to me, the Incoming Customer.

I agree:

- that if Telstra accepts this request, the above services will be provided by Telstra to me, the Incoming Customer in accordance with its standard terms and conditions;
- acceptance of this request by Telstra is subject to Telstra's ordinary credit approval process;
- to the terms and conditions of Telstra's Our Customer Terms located at <http://www.telstra.com.au/customerterms/index.htm> for the services being transferred to me;
- and acknowledge either receiving, or having had the opportunity to review, a copy of Our Customer Terms;
- to fulfil all obligations imposed upon the current for the services;
- and acknowledge that I have read and understand all statements made in this application form;
- I will be taking over the services listed above including any and all applicable contracts and that the nominated services will be transferred to my account with the same structure and set up as they currently have unless the plan is no longer available or I am not eligible, in which case, I consent to Telstra transferring the service to standard pricing.
- I will be liable for all debts incurred on the services listed above from the Date of Transfer, except for BigPond services where I may be liable for all outstanding charges on the account; and
- I will not seek to recover loss I have suffered or may suffer (either directly or indirectly) as a result of the transfer.

I warrant that I am authorised to make this request on behalf of the Incoming Customer.

Name

Position

Signature

Date

 / /

OFFICE USE ONLY

If this Change of Ownership form is being filled out by a Channel Partner, please provide your Dealer Code and contact information:

Dealer Code

Contact Name

Phone number

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Email address

Telstra Dealers: All mobile Change of Ownership requests are to be completed in store. Please refer to Retail Live or contact Retail Channel Support if further information is required. <https://retaillive.com.au/45570.aspx>

Terms and conditions

Please ensure you read all terms and conditions before signing.