

# Change of Ownership or Transfer of Lease Request



Business to Business

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 the 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 or Transfer of Lease 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 store 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

### To be completed by the customer that currently owns or leases the services (Outgoing Customer)

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 on **13 2000**.

You can list whole account numbers, individual services or both as below. Please note transferring services may affect your current pricing. Please ensure you have checked your plan terms and conditions before proceeding.

\*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.


**Services to be transferred can include but not limited to:**

- Landline services
- Mobile services (including leased 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.

## Part A (continued)

### 2. Do you want to transfer individual services?

- No – Continue below
- Yes – List service numbers here. Only these services/mailboxes will be transferred (unless part of a bundle)


Please provide details of all associated services/accounts to the Incoming Customer before this transfer can take place.

If there is a Mobile Device contract associated with your service, including leased devices, you will need to hand this device over to the Incoming customer at the time the contract is transferred.

We suggest you provide a copy of the Critical Information Summary to the Incoming Customer provided to you at the time of connection or you can obtain a copy from [telstra.com](http://telstra.com) (search critical information summary).

### TBS (Telstra Business System)/Phone System

Are you transferring a TBS/Phone System?

- No – You may skip to Transfer Date section on this page
- 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.

### 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, providing you have given at least 7 days notice.

When services in a bundle are nominated to transfer (e.g. 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.

#### 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".

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 Details

To be completed by the customer that currently owns the services (Outgoing Customer)

Customer name

Business or trading name

ACN/ABN/ARBN

I am currently listed as a Full Authority contact 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 account 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 can't be retained on the same plan because those plans are no longer available or the Incoming Customer is not eligible, Early Termination Charges may be applied to your account. To discuss possible ETC charges please contact Telstra on 13 2000.

- MessageBank services for fixed and mobiles phones reset to the default settings when a Change of Ownership or Transfer of Lease 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 and associated charges.
- Silent Line subscription and associated charges existing on fixed services will remain when the service is transferred.
- Priority Assistance existing on fixed services will be removed when the service is transferred. Incoming Customer may contact Telstra to confirm eligibility after transfer.
- BigPond Mailboxes and Telstra Mail services will retain existing and newly received emails that will be available to the Incoming Customer.
- If you have BigPond Mailboxes or Telstra Mail services that will remain on your account without an active internet connection, you may be charged an ongoing subscription fee.

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.

#### 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;
- I have handed over all related Mobile devices associated with the contracts to be transferred.
- 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;
- the recipient of the email address(es) transferred 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.

#### Your business information

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

#### Authorised Representative

Please ensure you provide a number and email address you can be contacted on.

#### 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 or Transfer of Lease 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.

## Part B – Outgoing Customer Details (continued)

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 confirm that I have provided a copy of the contract associated with all services/accounts included in this transfer request to the Incoming Customer; and

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

Full name

Signature

Date

## Part C – Incoming Customer Details

### To be completed by the customer that will be receiving the services (Incoming Customer)

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 6)

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](http://asic.gov.au) or the Australian Business Register – [abr.business.gov.au/Index.aspx](http://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?

Yes – Provide account number here

No – A new billing account will be created for you

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

I am currently listed as a Full Authority contact 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 Incoming Customer Authorisation and Identification (page 9) 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.

This authorisation information is required for credit assessment purposes.

## Part C – Incoming Customer Details (continued)

### 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](http://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](http://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.

I am currently listed as a Full Authority contact to act on behalf of the Incoming Customer

Title (Mr, Mrs, etc)

Full name

Date of birth

DD/MM/YYYY

Phone number

Email address

**Once company section has been completed, go to Incoming Customer Authorisation and Identification (page 9) for ID requirements.**

## Part C – Incoming Customer Details (continued)

### 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 and you are not already the owner of the services. 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  
 DD/MM/YYYY (  )

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 – As above

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.

Current residential 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.

## Part C – Incoming Customer Details (continued)

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

    

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 Incoming Customer Authorisation and Identification (page 9) for ID requirements.**

# Incoming Customer Authorisation and Identification

## 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

## Incoming Customer ID requirement

The person authorising this transaction must provide 100 points of ID, including primary and secondary ID, as part of this application. This is a requirement and must be provided for every change of ownership or transfer of lease 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.
- For information on what ID you can provide to Telstra, including a comprehensive list of acceptable primary and secondary ID and their point values, please visit [telstra.com](http://telstra.com) and search 'Acceptable Identification' or call Telstra on 13 2000.

## ID type and identification number

**Primary ID type (must include photo and DOB)** (eg. 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"/>

I have attached a copy of this ID to this form

**Secondary ID type** (eg. Medicare card, Seniors card, proof of age card)

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

I have attached a copy of this ID to this form

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

I have attached a copy of this ID to this form

## Authorised Representatives

If you require additional contacts to be added to the account, please contact Telstra on 13 2000 or visit a Telstra store with the relevant identification.

## Agreement – Incoming Customer to Sign

### Terms and conditions

Please ensure you read all terms and conditions before signing.

#### Important information

- Before agreeing to take over the ownership or lease of the above services, you must review and agree to the conditions set out in the relevant Critical information Summary.
- Where services cannot be retained on the same plan because those plans are no longer available or you are not eligible for the plan, 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**.
- Where contract include a Mobile device, this device should be handed over to you, by the outgoing customer, at the time the contract is transferred.
- The services listed above will be transferred as is along with any additional products attached to those services.
- Silent Line subscription and associated charges existing on fixed services will remain when the service is transferred.
- Priority Assistance existing on fixed services will be removed when the service is transferred. Contact Telstra to confirm eligibility after transfer.

If you have BigPond Mailboxes or Telstra Mail services transferred to your account without an active internet connection, you may be charged an ongoing subscription fee.

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:

- 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, in which case I consent to Telstra transferring the service to a reasonably comparable plan on standard pricing;
- that acceptance of this request by Telstra is subject to Telstra's ordinary credit approval process;
- to terms and conditions of Telstra's Our Customer Terms located at [telstra.com.au/customerterms/index.htm](http://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 owner under the existing contract for the services;
- I will be liable for all debts incurred on the services listed above from the date of transfer, except for BigPond services, where I will be liable for all outstanding charges on the account;
- I agree that I will not seek to recover loss I have suffered or may suffer (either directly or indirectly) as a result of the transfer;
- that Telstra may, subject to the Privacy Act 1988:
  - a) verify my identifying information (such as my driver's licence or passport) with the document issuer or official record holder; and
  - b) disclose information about me and this application (including information contained in any application for additional services and information about the conduct of my account) to a credit reporting body to obtain credit reporting information about me and to another credit provider or a debt collection agent to collect overdue payments relating to credit owed by me and to notify defaults by me to a credit reporting body; and
  - c) obtain and use information about my creditworthiness (including consumer credit reporting information or a commercial credit report) from a credit reporting body or other business that reports on creditworthiness or from a credit provider to assess any application for services or to collect any overdue payments,
- where applicable, I have read considered and understand the Telstra StayConnected Critical Information Statement. I agree to the terms and conditions for StayConnected; and
- I have read and understand all statements made in this application form.

#### 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 or Transfer of Lease form is being filled out by a Channel Partner, please provide your Dealer Code and Contact Information.

Dealer code

Contact name

Contact number

Contact email

### Telstra Dealers

All mobile Change of Ownership or Transfer of Lease 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>