

Advised client Data feed application



NWADADDFAF

Please use **BLACK** pen and **BLOCK** letters.

The purpose of this data feed application form ("**Form**") is to allow an authorised representative to request Netwealth begin sending data to a Third Party Software Provider selected in Step 2. The Terms in Step 3 contain some defined terms which are used in, and are applicable to, this Form.

Please note: the data feed will apply to all Clients who are linked to the adviser code specified in Step 1 below, unless You are selecting individual Clients for Class Super and/or BGL 360 and/or SuperMate data feeds.

Step 1. Provide adviser details

| | |
|--------------|----------------------|
| Adviser name | <input type="text"/> |
| Adviser code | <input type="text"/> |

Step 2. Select your Third Party Software Provider

You can select one or more of the following:

- | | | | | | |
|---------------------------------------|---|---|--|---|-------------------------------------|
| <input type="checkbox"/> Xplan | <input type="checkbox"/> Xeppo | <input type="checkbox"/> Intelliflo | <input type="checkbox"/> My Prosperity | <input type="checkbox"/> Fin365 | <input type="checkbox"/> Plutosoft |
| <input type="checkbox"/> AdviserLogic | <input type="checkbox"/> Asora | <input type="checkbox"/> SuperMate | <input type="checkbox"/> Complii | <input type="checkbox"/> PlatformPlus | <input type="checkbox"/> SynCRM |
| <input type="checkbox"/> PIMS | <input type="checkbox"/> WealthConnect | <input type="checkbox"/> PAS ¹ | <input type="checkbox"/> Viridian ¹ | <input type="checkbox"/> Kearney ¹ | <input type="checkbox"/> FabricRisk |
| <input type="checkbox"/> Hero360 | <input type="checkbox"/> InvestmentLink | <input type="checkbox"/> Masttro | <input type="checkbox"/> M2Wealth | <input type="checkbox"/> SS&C Evare | <input type="checkbox"/> Sesame |

AND/OR one or more of the following:

- | | | |
|---|----|---|
| <input type="checkbox"/> Class Super data feeds for all of my clients | OR | <input type="checkbox"/> Class Super data feeds for selected clients ² |
| <input type="checkbox"/> BGL 360 data feeds for all of my clients | OR | <input type="checkbox"/> BGL 360 data feeds for selected clients ² |
| <input type="checkbox"/> SuperMate data feeds for all of my clients | OR | <input type="checkbox"/> SuperMate data feeds for selected clients ² |

¹ This option is limited to clients of this Third Party Software Provider only.

² You can select individual clients for Class Super, BGL 360 and/or SuperMate data feeds in your online adviser account using the Data Feed Settings function.

Step 3. Netwealth Terms and Conditions for the provision of data feeds ("Terms")

The provision of data feeds is subject to these Terms as amended from time to time. Netwealth may, acting reasonably and to the extent reasonably necessary to protect its legitimate business interests, vary the these Terms from time to time, with or without notice to You. If a material change to these Terms occurs, we will notify You within 30 days after the date on which the change occurred.

1. Currency and accuracy of information

- 1.1 While Netwealth has taken all reasonable care in producing the Data for data feeds, subsequent changes in circumstances may occur at any time and may impact on the accuracy of the Data. Neither Netwealth nor its directors or employees give any warranty, make any representation as to, or accept responsibility for, the accuracy, reliability, timeliness or completeness of the Data provided by this service now or in the future. It is Your responsibility to check the Data provided to verify its accuracy.

2. Third Party Software Providers

- 2.1 By registering for data feeds, You are instructing Netwealth to share Clients' Data with Third Party Software Providers. Netwealth is not responsible for the actions of such third parties and is not liable for any loss You or Your Client(s) may incur as a result of a third party's misuse of information it receives from Netwealth.

3. Warranties and obligations

- 3.1 You warrant that:
- 3.1.1 You have the consent of Clients to share the Data contained in data feeds with Third Party Software Providers. With the exception of Client specific data feeds (such as Class Super, BGL 360 and/or SuperMate data feeds), the Data of all Clients will be shared with Your nominated Third Party Software Providers;
- 3.1.2 Clients are aware that their Data may be sent overseas, and that You have obtained relevant Client consent or acknowledgement;
- 3.1.3 You and Clients are aware that nominated Third Party Software Providers may also utilise their own service providers and share Clients' Data with other third parties, including overseas; and

