Family group request

NWADADFFLF

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

In this form references to 'I', 'me' and 'my' include individual investors, joint investors and corporate investors.

Use this form to establish or maintain a family group that you wish the family fee rebate to be applied to. Family groups are subject to the following rules:

1. A family group can have a maximum of six linked accounts and can include the following:
   a) Members of the same immediate family (spouse, de facto/domestic partner, child, parent, sibling and grandchild); and
   b) Companies, family trusts, and self-managed superannuation funds, provided the directors/beneficiaries are members of the same immediate family.
2. Not all Netwealth accounts can be linked in a family group:
   a) Super Accelerator Plus and Wealth Accelerator Plus accounts may be linked with one another.
   b) Accounts within the same superannuation product (e.g. Super Accelerator) or within the same version of the Netwealth Wrap Service (e.g. Wealth Accelerator) that have different management fee scales may not be linked with one another.
   c) Super Accelerator Core, Wealth Accelerator Core, Russell Investments Wealth Series and Russell Investments Super Series accounts are not eligible to be linked in family groups.
   d) Employer Sponsored Super accounts are not eligible to be linked in family groups.
3. A family group request can be accepted or rejected or a linking can be cancelled by Netwealth at any time.
4. If applicable, each account in a family group must have the same adviser representative.

⚠ You should read the current disclosure documents for the product in which your account is held as there may have been changes to the terms and conditions governing this transaction. The current disclosure documents are available on our website.

Step 1. Provide family group details

☐ I already hold an existing family group account and now wish to link one or more additional accounts.

Family group account number F G ☐☐☐☐☐☐☐☐ (proceed to Step 2)

OR

☐ I wish to set up a new family group account.

Account 1 (primary account holder)

Client name

Client number | Account number

Step 2. Nominate account(s) to be added or linked

Account 2

Client name

Client number | Account number

Relationship to primary account holder: ☐ Spouse/domestic partner ☐ Child ☐ Parent ☐ Sibling ☐ Grandchild ☐ Additional account

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Step 2. Nominate account(s) to be added or linked (continued)

Account 3

Client name

Client number | Account number

Relationship to primary account holder: ☐ Spouse/domestic partner ☐ Child ☐ Parent ☐ Sibling ☐ Grandchild

☐ Additional account

Account 4

Client name

Client number | Account number

Relationship to primary account holder: ☐ Spouse/domestic partner ☐ Child ☐ Parent ☐ Sibling ☐ Grandchild

☐ Additional account

Account 5

Client name

Client number | Account number

Relationship to primary account holder: ☐ Spouse/domestic partner ☐ Child ☐ Parent ☐ Sibling ☐ Grandchild

☐ Additional account

Account 6

Client name

Client number | Account number

Relationship to primary account holder: ☐ Spouse/domestic partner ☐ Child ☐ Parent ☐ Sibling ☐ Grandchild

☐ Additional account

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Step 3. Read and sign this client declaration

(Where this form is completed by an adviser who is an Adviser Representative for each of the clients and each of the accounts included on this form, go to Step 4.)

This application is available online. The offline transaction fee will not apply if you choose to use this form.

For **Super Accelerator** this form is to be signed by the member/s.

For **Wealth Accelerator** for any account in joint names, all account holders must sign. Companies may sign in accordance with their constitution and the law.

It is recommended that you retain a copy of the completed form for your own records.

Account 1 (primary account holder)

I declare that all account holders named on this form are eligible to be members of a family group, as described in this form, and I consent to be grouped for the purpose of the family fee rebate. (If there are more than two signatories, additional signatories can sign in the next signature space provided immediately below).

Account signatory one

Position/title
- [ ] Individual
- [ ] Director
- [ ] Sole director & sole company secretary
- [ ] Other

Signature

Date D D / M M / Y Y

Account signatory two (if applicable)

Position/title
- [ ] Individual
- [ ] Director
- [ ] Company secretary
- [ ] Other

Signature

Date D D / M M / Y Y

Account 2 - I declare that I am eligible to be part of a family group, as described in this form. (If there are more than two signatories, additional signatories can sign in the next signature space provided immediately below).

Account signatory one

Position/title
- [ ] Individual
- [ ] Director
- [ ] Sole director & sole company secretary
- [ ] Other

Signature

Date D D / M M / Y Y

Account signatory two (if applicable)

Position/title
- [ ] Individual
- [ ] Director
- [ ] Company secretary
- [ ] Other

Signature

Date D D / M M / Y Y

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Step 3. Read and sign this client declaration (continued)

Account 3 - I declare that I am eligible to be part of a family group, as described in this form. (If there are more than two signatories, additional signatories can sign in the next signature space provided immediately below).

Account signatory one

Position/title ☐ Individual ☐ Director ☐ Sole director & sole company secretary

☐ Other

Signature

Date D D / M M / Y Y

Account signatory two (if applicable)

Position/title ☐ Individual ☐ Director ☐ Company secretary

☐ Other

Signature

Date D D / M M / Y Y

Account 4 - I declare that I am eligible to be part of a family group, as described in this form. (If there are more than two signatories, additional signatories can sign in the next signature space provided immediately below).

Account signatory one

Position/title ☐ Individual ☐ Director ☐ Sole director & sole company secretary

☐ Other

Signature

Date D D / M M / Y Y

Account signatory two (if applicable)

Position/title ☐ Individual ☐ Director ☐ Company secretary

☐ Other

Signature

Date D D / M M / Y Y

Account 5 - I declare that I am eligible to be part of a family group, as described in this form. (If there are more than two signatories, additional signatories can sign in the next signature space provided immediately below).

Account signatory one

Position/title ☐ Individual ☐ Director ☐ Sole director & sole company secretary

☐ Other

Signature

Date D D / M M / Y Y

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Step 3. Read and sign this client declaration (continued)

Account signatory two (if applicable)

Position/title ☐ Individual ☐ Director ☐ Company secretary

☐ Other

Signature

Date D D / M M / Y Y

Account 6 - I declare that I am eligible to be part of a family group, as described in this form. (If there are more than two signatories, please copy this page.)

Account signatory one

Position/title ☐ Individual ☐ Director ☐ Sole director & sole company secretary

☐ Other

Signature

Date D D / M M / Y Y

Account signatory two (if applicable)

Position/title ☐ Individual ☐ Director ☐ Company secretary

☐ Other

Signature

Date D D / M M / Y Y

Step 4. Read and sign this adviser declaration (if applicable)

(To be completed by an adviser representative providing instruction on behalf of their client(s).)

By submitting this instruction, I represent to Netwealth that all the details in this transaction are true and correct and I declare that:

1. I am the nominated adviser representative for each of the clients and each of the accounts included on this form and that my appointment has not been revoked and each client has authorised me to submit this instruction as the client's agent;
2. The account holders listed on this form are all eligible to be part of a family group, as described in this form; and
3. I acknowledge that this transaction is governed by the terms and conditions for such transactions as set out in the relevant disclosure documents current as at the date I sign this form.

⚠ You should give your client the current disclosure documents for the product in which this account is held.

Adviser Representative

Signature

Date D D / M M / Y Y

Step 5. Once complete please send to us

Send to us: contact@netwealth.com.au | Netwealth Investments Limited, Reply Paid 336, South Melbourne VIC 3205

Activities & Tasks > Document Upload > Other (Advisers only)

For more information: netwealth.com.au | 1800 888 223 | Your adviser

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