

Superannuation Personal Insurance Advice fee instruction



NWINSUAFIN

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

⚠ You should read the current Product Disclosure Statement 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 Product Disclosure Statement is available on our website.

Step 1. Provide member details

Client name	<input type="text"/>
Client number	<input type="text"/> Netwealth account number <input type="text"/>

Step 2. Nominate adviser and adviser fees

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

Please provide the details of ongoing member advice fee – insurance that you agree with your Financial Adviser, including GST. You authorise and direct us to pay these amounts to the AFS Licensee for whom your Financial Adviser acts as an authorised representative (whoever that may be from time to time) and you consent to some or all of this amount being paid by the AFS Licensee to your Financial Adviser (or their nominee).

This fee will apply to all Personal Insurance, under the Group Life policy, that is attached to your superannuation account. Any existing ongoing advice fee arrangements will cease to apply. The amount of your insurance premium and related costs will be amended to reflect this change.

Ongoing member advice fee - insurance % (0-25%)

Please refer to the 'Insurance Guide' for a full description of the member advice fee.

Netwealth may be entitled to receive a Reduced Input Tax Credit ('RITC') on this fee and the amount included in your premium to pay this fee may be less than the amount shown on this form.

Step 3. Read and sign this client declaration

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 authorise and direct Netwealth to deduct the member advice fee – insurance specified in Step 2 from my insurance premium and pay the full amount to the AFS Licensee for whom my Financial Adviser acts as an authorised representative as consideration for financial product advice;
2. I confirm that any member advice fees entered at Step 2 are for financial product advice provided to me by my Financial Adviser relating solely to my Netwealth Superannuation account;
3. I have received, read, and understood and agree to be bound by the terms and conditions set out in the relevant Product Disclosure Statement including the insurer's privacy policy for the Netwealth Superannuation Master Fund current as at the date I sign this form; and
4. I authorise Netwealth to disclose to my Financial Adviser (if applicable) information regarding this transaction and/or my investments held through the Netwealth Superannuation Master Fund.

Full name	<input type="text"/>
Signature of the person to be insured	<input type="text"/>
Date	<input type="text"/> / <input type="text"/> / <input type="text"/>

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

This transaction is not available online and the offline transaction fee will not apply to this transaction.

Step 4. Once complete please send to us

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

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