Superannuation Term deposit instruction



NWCLMATDIF

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

This transaction is available online. The offline transaction fee will apply if you choose to undertake this transaction offline using this form. If you do not currently have access to your Netwealth account you can contact your adviser to arrange the transaction or arrange online access using a 'Change of details' form available from our website.

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																	
Client number]		Acco	ount	nui	mbe	r							

Step 2. Purchase instructions

Please detail the term deposit that you wish to purchase. The minimum purchase for a term deposit is \$5,000. Monies to purchase the term deposit will be sourced from your cash account. We can also accept term deposit instructions via the Netwealth website. Simply login to your account and select 'Switch' from the Transaction menu.

1 The Netwealth website provides information on available commencement dates and current rates. Please ensure the information you enter below accurately represents one of the options listed on our site.

Term deposit commencement date															
Provider	National Australia Bank	ANZ	Bank of Queensland												
Term	3 months 6 months	12 months	3 years 5 years												
Rate	%														
Amount to deposit \$		0 0													

1. What happens when the term ends?

At the end of the term, your investment will go back into your cash account unless you have instructed Netwealth to roll it over into another term deposit (or some other investment) on the relevant form. If you do not ask Netwealth to roll it over, it will stay in the cash account until you give instructions as to what you want to do with it.

Please note that Netwealth will not notify you when the term has ended. It is your responsibility to give Netwealth investment instructions if you want your investment to be rolled into another term deposit or other investment. Until Netwealth receives your instructions, it will hold your investment in your cash account. Your cash account may not pay as high a rate of interest as a term deposit.

2. Will Netwealth automatically roll my term deposit at the end of the term?

No, it is important to remember that Netwealth will hold your investment in the cash account until you instruct Netwealth what you want to invest it in.

3. What if I want my money back before the term has ended?

You may only be able to withdraw early from your investment in the term deposit under limited circumstances. Please refer to the product disclosure statement or terms and conditions document for your chosen term deposit, located on the Netwealth website, for further details.

Step 3. Read and sign this client declaration (where this form is completed by an Adviser Representative on the account, go to Step 4)

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 have received, read and understood and agree to be bound by the terms and conditions set out in the relevant Product Disclosure Statement for the Netwealth Superannuation Master Fund current as at the date I sign this form;
- 2. I have been given a product disclosure statement, terms and conditions or other disclosure document for the term deposit being invested in through the Netwealth Superannuation Master Fund as selected in this instruction; and
- 3. Lauthorise Netwealth to disclose to my Financial Adviser (if applicable) information regarding this transaction and/or my investments held through the Netwealth Superannuation Master Fund.

Member

Date DD/MM/YY

Signature

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

Step 4. Read and sign this adviser declaration (to be completed by an Adviser Representative providing instruction on behalf of the client)

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 this client, my appointment has not been revoked and the client has authorised me to submit this instruction as the client's agent;
- 2. I acknowledge that this transaction is governed by the terms and conditions for such transactions as set out in the relevant Product Disclosure Statement for the Netwealth Superannuation Master Fund current as at the date I sign this form; and
- 3. I have given the client a product disclosure statement, terms and conditions or other disclosure document for the term deposit being invested in as selected in this instruction.

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

Adviser Representative																										
Signature																		Dat	e	D)	/ 🛽	/1 1	/	Y	Y
Step 5. Once complete please send to us																										
Send to us: @	contact@netv Activities & Ta					•		wealt Other (n Ma	aster	⁻ Fui	nd, I	Reply	/ Pai	d 331	6, Sc	outh	Mel	boui	rne V	IC 32	205

For more information: 🛄 netwealth.com.au

Π 1800 888 223

