

# 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	<input type="text"/>
Client number	<input type="text"/>
Account number	<input type="text"/>

## 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.

**⚠** 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	<input type="text"/>
Provider	<input type="checkbox"/> National Australia Bank <input type="checkbox"/> ANZ <input type="checkbox"/> Bank of Queensland
Term	<input type="checkbox"/> 3 months <input type="checkbox"/> 6 months <input type="checkbox"/> 12 months <input type="checkbox"/> 3 years <input type="checkbox"/> 5 years
Rate	<input type="text"/> %
Amount to deposit	\$ <input type="text"/>

### 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.

