

Superannuation Additional contribution

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

⚠ You should read the current Product Disclosure Statement ('PDS') 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							Account number																							

Step 2. Provide rollover contribution details (if any)

If your contribution involves a rollover from another fund, please complete the details below and attach a completed 'Rollover/transfer request' form.

Fund name																															
Policy/Account number													Approximate amount \$																		
Fund name																															
Policy/Account number													Approximate amount \$																		
Fund name																															
Policy/Account number													Approximate amount \$																		
Fund name																															
Policy/Account number													Approximate amount \$																		

Step 3. Provide other contribution details (if any)

Concessional contributions

Superannuation guarantee contributions (employer)	\$																		
Salary sacrifice contributions (employer)	\$																		
Personal contribution for which you intend to claim a tax deduction ¹	\$																		

⚠ You will only be able to claim a tax deduction on contributions for which we have received a valid notice. Not submitting a notice may impact on the deductibility of contributions and the level of contributions that count toward your contribution limits. This can have significant tax consequences.

You or your Nominated Financial Adviser can claim a tax deduction for eligible contributions online.

Non-concessional contributions²

Personal contribution	\$																		
Spouse contribution	\$																		
Other ³ (please attach details)	\$																		
Total of all contributions	\$																		

¹ A personal contribution for which a tax deduction is intended to be claimed must be accompanied by a valid 'Notice of intent to claim or vary a deduction for personal super contributions' form issued by the Australian Tax Office or a valid Netwealth online tax deduction form. If you do not submit a valid form at the same time as the contribution, we will process the contribution as a personal non-concessional contribution. Alternatively, you will have the opportunity to claim a tax deduction for that contribution at the end of the financial year when Netwealth sends you a section 290.170 notice. For more information on the conditions which must be met for claiming a deduction, go to www.ato.gov.au and search for 'claiming deductions for personal super contributions'.

² If you have not previously quoted your tax file number ('TFN') to us we must return non-concessional contributions to you. A 'Tax File Number notification' form can be obtained from your adviser or from our website.

³ This may include personal injury contributions or disposal of small business contributions. Please refer to the PDS for further details of types of contributions that can be made to your account.

Superannuation Additional contribution

Step 3. Provide other contribution details (if any) (continued)

Contribution method

Electronic funds transfer BPAY* Direct debit (you must also attach an original 'Direct debit request' form)

Please refer to the additional information on how to contribute in Step 8 of this form.

Step 4. Make an investment choice for the contributions

You can invest your contribution online via your Netwealth account. If you choose to invest online, please proceed to Step 5.

⚠ The offline transaction fee will apply if you choose to supply your investment instructions using this form.

You may only select investment options available for the product in which your account is held.

Investment options

Details and minimums

Cash account

You must reserve as the minimum cash requirement an amount which is equal to the sum of:

- 1% of your account balance or \$500, whichever is greater, up to a maximum of \$5,000;
- Where you are receiving weekly, fortnightly, monthly or quarterly payments from an income stream or pension, the amount equal to:
 - four weekly payments;
 - two fortnightly payments;
 - one monthly payment; or
 - one quarterly payment; and
- Where you have insurance in place, the amount equal to one monthly or one quarterly insurance premium payment (as applicable).

Term deposits

Minimum amount of \$5,000 into any one term deposit. Term deposits can be traded through your online account.

Fixed term annuities⁴

Minimum amount of \$10,000 into any one fixed term annuity. Fixed term annuities can be traded through your account online.

Managed funds

Minimum amount of \$100 into any one managed fund.

Managed Models

Each Managed Model has a minimum investment. Refer to the relevant PDS Part 2 – Managed Models Booklet.

Listed securities⁵

Australian listed securities can be traded through your account online or by using an 'Investment instruction' form available on our website or from your adviser. International securities can only be traded through your account online.

Cash account

Amount to invest (\$)

OR

Percentage to invest (%)

Managed funds, Managed Model⁶ and other investments

Fund or Managed Model name

Code⁷

Amount to invest (\$ or %)

Fund or Managed Model name

Code⁷

Amount to invest (\$ or %)

Fund or Managed Model name

Code⁷

Amount to invest (\$ or %)

⁴ You may only invest in fixed term annuities if you have chosen Super Accelerator.

⁵ You may only invest in listed securities if you have chosen Super Accelerator Plus.

⁶ Where you select a Managed Model you are instructing Netwealth to invest using a Managed Account as described in the Product Disclosure Statement.

⁷ APIR code for a managed fund or the Netwealth code for a Managed Model in the Investment Menu.

Step 4. Make an investment choice for the contributions (continued)

Fund or Managed Model name	<input type="text"/>	<input type="text"/>
Code⁷	<input type="text"/>	Amount to invest (\$ or %) <input type="text"/>
Fund or Managed Model name	<input type="text"/>	<input type="text"/>
Code⁷	<input type="text"/>	Amount to invest (\$ or %) <input type="text"/>
Fund or Managed Model name	<input type="text"/>	<input type="text"/>
Code⁷	<input type="text"/>	Amount to invest (\$ or %) <input type="text"/>
Fund or Managed Model name	<input type="text"/>	<input type="text"/>
Code⁷	<input type="text"/>	Amount to invest (\$ or %) <input type="text"/>
Fund or Managed Model name	<input type="text"/>	<input type="text"/>
Code⁷	<input type="text"/>	Amount to invest (\$ or %) <input type="text"/>
Fund or Managed Model name	<input type="text"/>	<input type="text"/>
Code⁷	<input type="text"/>	Amount to invest (\$ or %) <input type="text"/>
Fund or Managed Model name	<input type="text"/>	<input type="text"/>
Code⁷	<input type="text"/>	Amount to invest (\$ or %) <input type="text"/>

⁷ APIR code for a managed fund or the Netwealth code for a Managed Model in the Investment Menu.

Step 5. Nominate and consent to member advice fees (Fee Recipient)

A reference to your Adviser means the Nominated Financial Adviser on your account. By completing this section:

- You provide consent to Netwealth to arrange the deduction of fees from your account for payment to your Adviser; and
- You authorise and direct Netwealth to pay the member advice fees set out in this form to the AFS Licensee for whom your 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 Adviser (or their nominee).

Consent to deduct fees

Your consent is being sought by Netwealth to deduct the member advice fees in this Step from your Netwealth Superannuation Master Fund account. Your consent will last until the amount has been deducted from your account.

These fees are for services provided to you by your Adviser. Your Adviser is required to obtain your written consent before the ongoing fees can be deducted from your account. This form can be used to provide that consent.

If you are not happy with the amount described, you do not have to sign this form, in which case the fees will not be paid to your Adviser. You may withdraw your consent prior to the fee deduction occurring by contacting Netwealth by email at contact@netwealth.com.au or calling 1800 888 223.

You may vary or withdraw your consent to deduct fees at any time by contacting your Adviser in writing or notifying Netwealth.

Member advice fees can only be paid from your superannuation account for personal advice services provided to you by your Adviser specifically in relation to your superannuation account. A separate consent form must be provided for each account, and the advice fees can only be charged in accordance with your consent.

Superannuation Additional contribution

Step 5. Nominate and consent to member advice fees (Fee Recipient) (continued)

Adviser name

Adviser code

Adviser Email

Adviser Phone ()

AFS Licensee name

AFS Licensee number

Upfront member advice fee (including GST)

Please provide the details of any upfront member advice fees that you agree with your Nominated Financial Adviser, including GST⁸.

Fixed percentage rate % This will apply to the total contributions shown on this form.

Your Adviser estimates that this fee will be approximately \$

This is based on the total contributions expected to be received in your account, as estimated by your Adviser.

AND/OR

Fixed dollar amount \$ This is a one-off fee.

This fee applies to this additional contribution only and is applied upon receipt of the contribution.

⁸ Please note, you can only pay member advice fees from Super for advice given by your Nominated Financial Adviser in relation to your Netwealth Superannuation account.

The member advice fees set out above can only be paid for services provided to you by your Adviser in relation to your superannuation account. These services may include financial advice provided to you by your Adviser and/or your Adviser arranging aspects of your superannuation account on your behalf. Services may be provided once only during the period to which the fee applies. Please indicate what services you have agreed are to be provided by your Adviser for the payment of the member advice fees included in this form:

Once only service	Service	
<input type="checkbox"/>	Structure & contributions	The suitability of your superannuation arrangements, establishing your superannuation account, the amount and type of contributions to make to your superannuation account, the consolidation of superannuation benefits and rollovers into your superannuation account
<input type="checkbox"/>	Investment	The investment strategy for your superannuation account and/or the selection of investment options in your superannuation account
<input type="checkbox"/>	Retirement planning	Using your superannuation account to accumulate savings for your retirement, transitioning to retirement, generating a regular income in retirement and/or managing Centrelink entitlements
<input type="checkbox"/>	Estate planning	Using your superannuation as part of your estate planning strategies including beneficiary nominations
<input type="checkbox"/>	Insurance	Using your superannuation account for insurance and/or making a claim on insurance held through your superannuation account
<input type="checkbox"/>	Benefit payments	Making a withdrawal or drawing an income from your superannuation account
<input type="checkbox"/>	Tax planning	Consideration of the impact of your superannuation on your overall tax position, managing the tax payable on contributions to or income in your superannuation account and/or managing the tax on benefits received from your superannuation account.

Step 8. How to contribute

Method	Payment	Other requirements
Electronic funds transfer – for banking online	Bank: ANZ BSB number: 013 993 Account no.: Last 9 digits of your Netwealth account number Account name: For a new application – Netwealth Super Applications Account For an existing account – Client name Reference: A – Superannuation guarantee B – Salary sacrifice C – Personal contribution D – Spouse contribution	Example: to make a salary sacrifice contribution for Paul Smith's existing Netwealth account number 0001040500 enter details as follows: BSB number: 013 993 Account no.: 001040500 Account name: Paul Smith Reference: B Note: Personal contribution will be the default contribution type if no reference is provided.
BPAY®	Biller Codes: 156513: Superannuation guarantee 156539: Salary sacrifice 156505: Personal contribution 156521: Spouse	Each client has a unique BPAY® Customer Reference Number (CRN). This can be found on the Netwealth website, on periodic statements or by contacting Netwealth.
Direct debit	One-off direct debits or a regular contribution plan.	'Direct debit request' – to request a one-off or ad-hoc direct debit from your bank account; AND/OR 'Regular contribution plan' form – to commence a regular contribution plan.
SuperStream Employers Only	Bank: ANZ BSB number: 013 030 Account no.: 837 557 724 Reference: Same as SuperStream contribution message	Example: to make a SuperStream contribution for Netwealth account number 0001040500 send the SuperStream contribution message to: ABN: 94 573 747 704 USI: NET0017AU Member ID: 0001040500

 All contribution remittances except SuperStream must be sent to remittance@netwealth.com.au

It is important to follow these contribution instructions carefully, otherwise we may not be able to correctly allocate your contribution to your account.

® Registered to BPAY Pty Ltd ABN 69 079 137 518


Rollovers to the Netwealth Superannuation Master Fund

You can request a rollover from another fund through your online account, or by completing a 'Rollover/transfer request' form and returning it to us with the required further information as detailed in that form.

Step 9. Once complete please send to us via our secure online document upload facility

Upload via your online account:  [Activities & Tasks > Document Upload](#)

For more information:  netwealth.com.au

 1800 888 223

 [Your adviser](#)