

# Adviser User nomination



NWADADAUNF

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

The purpose of this form is to allow an Adviser who has entered into an 'Adviser Registration Agreement' with Netwealth to nominate individuals ('Users') who will have online access to the Adviser's Clients' accounts and carry out certain administrative functions under the Adviser Registration Agreement with Netwealth. All nominations of Users to operate Clients' accounts are subject to the agreement of Netwealth in its absolute discretion. Terms used in this form have the same meaning as they have in the 'Definitions' section of the Adviser Registration Agreement unless the context requires otherwise.

## Step 1. Provide Adviser details

Adviser name	<input type="text"/>
Business name (if applicable)	<input type="text"/>
Netwealth Adviser code	<input type="text"/>

## Step 2. Nominate Users

**You must notify Netwealth as soon as reasonably possible if any User ceases to be an officer or employee of the Adviser or the Adviser's AFS Licensee or otherwise ceases to be entitled to remain as a User.**

A User's capabilities will depend on whether or not the Adviser has been appointed as the Adviser Representative on a Client's account and the level of access provided to the User.

Full Access: Allows Users to enquire, create reports and transact

Browse only access: Allows Users to enquire, create reports and prepare forms but not transact

If you have more than five Users to nominate, please use another copy of this form.

All Users nominated below will be provided with access to all of your Clients' details through the Netwealth Website.

Passwords and instructions for use by Users will be sent to the specific User's email address to which it applies.

 Please ensure you supply a mobile contact number.

### User 1

Mr/Mrs/Miss/Ms/Dr/Other	<input type="text"/>	Family name	<input type="text"/>
Given name(s)	<input type="text"/>		
Mobile (required)	<input type="text"/>		
Email	<input type="text"/>		
Position/title	<input type="text"/>		
Existing username (if applicable)	<input type="text"/>		
Online access	<input type="checkbox"/> Full access	<input type="checkbox"/> Full access (excluding withdrawals)	<input type="checkbox"/> Browse only access

By signing this form, the User named agrees that, in consideration for Netwealth allowing the User to use the Website to carry out administrative functions on behalf of the Adviser, the User will ensure that all actions taken by the User will be duly authorised by the relevant Client and by the Adviser.

User's signature	<input type="text"/>	Date	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>
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Step 2. Nominate Users (continued)

User 2

Mr/Mrs/Miss/Ms/Dr/Other  Family name

Given name(s)

Mobile (required)

Email

Position/title

Existing username (if applicable)

Online access  Full access  Full access (excluding withdrawals)  Browse only access

By signing this form, the User named agrees that, in consideration for Netwealth allowing the User to use the Website to carry out administrative functions on behalf of the Adviser, the User will ensure that all actions taken by the User will be duly authorised by the relevant Client and by the Adviser.

User's signature  Date  /  /

User 3

Mr/Mrs/Miss/Ms/Dr/Other  Family name

Given name(s)

Mobile (required)

Email

Position/title

Existing username (if applicable)

Online access  Full access  Full access (excluding withdrawals)  Browse only access

By signing this form, the User named agrees that, in consideration for Netwealth allowing the User to use the Website to carry out administrative functions on behalf of the Adviser, the User will ensure that all actions taken by the User will be duly authorised by the relevant Client and by the Adviser.

User's signature  Date  /  /

Step 2. Nominate Users (continued)

User 4

Mr/Mrs/Miss/Ms/Dr/Other  Family name

Given name(s)

Mobile (required)

Email

Position/title

Existing username (if applicable)

Online access  Full access  Full access (excluding withdrawals)  Browse only access

By signing this form, the User named agrees that, in consideration for Netwealth allowing the User to use the Website to carry out administrative functions on behalf of the Adviser, the User will ensure that all actions taken by the User will be duly authorised by the relevant Client and by the Adviser.

User's signature  Date  /  /

User 5

Mr/Mrs/Miss/Ms/Dr/Other  Family name

Given name(s)

Mobile (required)

Email

Position/title

Existing username (if applicable)

Online access  Full access  Full access (excluding withdrawals)  Browse only access

By signing this form, the User named agrees that, in consideration for Netwealth allowing the User to use the Website to carry out administrative functions on behalf of the Adviser, the User will ensure that all actions taken by the User will be duly authorised by the relevant Client and by the Adviser.

User's signature  Date  /  /

## Adviser User nomination

### Step 3. Cancel Users

#### Termination 1

Mr/Mrs/Miss/Ms/Dr/Other

<input type="text"/>	Family name	<input type="text"/>
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Given name(s)

<input type="text"/>
<input type="text"/>

#### Termination 2

Mr/Mrs/Miss/Ms/Dr/Other

<input type="text"/>	Family name	<input type="text"/>
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Given name(s)

<input type="text"/>
<input type="text"/>

#### Termination 3

Mr/Mrs/Miss/Ms/Dr/Other

<input type="text"/>	Family name	<input type="text"/>
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Given name(s)

<input type="text"/>
<input type="text"/>

#### Termination 4

Mr/Mrs/Miss/Ms/Dr/Other

<input type="text"/>	Family name	<input type="text"/>
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Given name(s)

<input type="text"/>
<input type="text"/>

### Step 4. Read and sign this Adviser declaration

By signing this instruction, I declare that this nomination is made in accordance with and complies with the Adviser Registration Agreement between Netwealth and myself.

Name

<input type="text"/>
<input type="text"/>

Adviser's signature

<input type="text"/>
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Date   /   /

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

### Step 5. Once complete please send to us

Send to us:



[contact@netwealth.com.au](mailto:contact@netwealth.com.au)



Netwealth Investments Limited, Reply Paid 336, South Melbourne VIC 3205



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For more information:



[netwealth.com.au](http://netwealth.com.au)



1800 888 223



Your adviser