

# Adviser User nomination

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.

Our Privacy Policy explains how we collect, use and disclose your personal information. Our Privacy Policy is available free of charge via links provided on the website or by contacting us to request a copy.

## Step 1. Provide Adviser details

Adviser name	<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"/>				
Are you known by any other name?	<input type="checkbox"/> No	<input type="checkbox"/> Yes	<input type="text"/>		
Date of birth	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>
Residential address (PO Box is NOT acceptable)	<input type="text"/>				
Suburb/town	<input type="text"/>				
State	<input type="text"/>	Postcode	<input type="text"/>	Country (if not Australia)	<input type="text"/>
Mobile (required)	<input type="text"/>				
Email	<input type="text"/>				
Position/title (mandatory)	<input type="checkbox"/> Financial Adviser	<input type="checkbox"/> Support staff			

Step 2. Nominate Users (continued)

Existing username (if applicable)

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

**!** If you do not have an Australian driver's licence or passport, or if you are using a foreign identity document, you will need to provide a certified copy of your identification. More information about acceptable identification and certification requirements is available online in our 'How to certify an identification document' guide.

Your Identification Details are required to enable Netwealth to confirm them with the Australian Government. Your Identification Details will be submitted to the Australian Government's Document Verification Service ('DVS'). The DVS is a national online system that allows organisations to compare an individual's identifying information with a government record. More information about the DVS is available on their website <https://www.dvs.gov.au>.

Australian driving licence number  Card number

State of issue

Date of issue  /  /  Date of expiry  /  /

**OR** Passport number

Date of issue  /  /  Date of expiry  /  /

By ticking the box below, you authorise us to use the details provided to verify your identity against records held by various Government agencies/bodies, for example an agency or body that issue passports, drivers licences or other identification cards (the 'Issuer or Official Record Holder of government records').

- I confirm that I:
- am authorised to provide the details and any supporting identification documents; and
  - agree that these details may be checked against records held by the Issuer or Official Record Holder of government records.

You do not have to give your consent in this section. In any event (whether you give consent or otherwise), we may request further information to meet our Anti-Money Laundering and Counter-Terrorism Financing (AML/CTF) obligations and be unable to process your request until that information is received and accepted.

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 2

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

Given name(s)

Are you known by any other name?  No  Yes

Date of birth  /  /

Residential address (PO Box is NOT acceptable)

Suburb/town

State  Postcode  Country (if not Australia)

Mobile (required)

Email

Position/title (mandatory)  Financial Adviser  Support staff

Existing username (if applicable)

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User's signature

Date  /  /

Step 2. Nominate Users (continued)

User 3

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

Given name(s)

Are you known by any other name?  No  Yes

Date of birth  /  /

Residential address (PO Box is NOT acceptable)

Suburb/town

State  Postcode  Country (if not Australia)

Mobile (required)

Email

Position/title (mandatory)  Financial Adviser  Support staff

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User's signature

Date  /  /

Step 2. Nominate Users (continued)

User 4

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

Given name(s)

Are you known by any other name?  No  Yes

Date of birth  /  /

Residential address (PO Box is NOT acceptable)

Suburb/town

State  Postcode  Country (if not Australia)

Mobile (required)

Email

Position/title (mandatory)  Financial Adviser  Support staff

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User's signature

Date  /  /

Step 2. Nominate Users (continued)

User 5

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

Given name(s)

Are you known by any other name?  No  Yes

Date of birth  /  /

Residential address (PO Box is NOT acceptable)

Suburb/town

State  Postcode  Country (if not Australia)

Mobile (required)

Email

Position/title (mandatory)  Financial Adviser  Support staff

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User's signature  Date  /  /

Step 3. Cancel Users

Termination 1

Mr/Mrs/Miss/Ms/Dr/Other     Family name   
Given name(s)

Termination 2

Mr/Mrs/Miss/Ms/Dr/Other     Family name   
Given name(s)

Termination 3

Mr/Mrs/Miss/Ms/Dr/Other     Family name   
Given name(s)

Termination 4

Mr/Mrs/Miss/Ms/Dr/Other     Family name   
Given name(s)





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   
  
Adviser's signature  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:  [Activities & Tasks > Document Upload](#)
- For more information:  [netwealth.com.au](http://netwealth.com.au)  1800 888 223  Your adviser