

Auto sell down profile selection

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

In this form references to 'I', 'me' and 'my' include individual investors, joint investors and corporate investors.

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 disclosure documents 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 disclosure documents are available on our website.

Step 1. Provide client details

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

Step 2. Select your auto sell down profile

You may nominate the order in which you want to sell down your investments to top up your cash account in the event that the balance of your cash account falls below the minimum cash requirement. You may select from one of the three auto sell down profiles:

Largest to smallest (default)

Investments will be sold down starting with your largest to smallest liquid managed fund holding and then other investments (from largest to smallest), until the minimum cash requirement is met.

! If you make no selection, you instruct us to apply this sell down profile.

OR

Pro-rata (not available for managed models)

Investments will be sold down firstly from liquid managed funds based on the proportion of your portfolio that they represent and then other investments (from largest to smallest) until the minimum cash requirement is met.

OR

Rank

Holdings in liquid managed funds, managed models and/or Australian listed securities will be sold down based on the ranking you select below, until the minimum cash requirement is met.

Rank	APIR/Model Code/ASX code	Asset name
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>
8	<input type="text"/>	<input type="text"/>
9	<input type="text"/>	<input type="text"/>
10	<input type="text"/>	<input type="text"/>
11	<input type="text"/>	<input type="text"/>
12	<input type="text"/>	<input type="text"/>

