



# Change of adviser

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

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

-  If the account in Step 1 has more than one username, the primary username will be reassigned to the new adviser in Step 2. Other usernames linked to the account will keep their existing adviser and will still be able to access the account after the change.
-  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"/>	<input type="text"/>
Client number	<input type="text"/>	
Account number(s)	<input type="text"/>	<input type="text"/>

## Step 2. Nominate your new Financial Adviser


Adviser name	<input type="text"/>	<input type="text"/>
Adviser code	<input type="text"/>	
AFS Licensee name	<input type="text"/>	<input type="text"/>

## Step 3. Consider an adviser representative nomination

I nominate the Financial Adviser named in Step 2 as my Adviser Representative who will be empowered to act on my behalf on matters relating to my account (including receiving documents on my behalf) unless I inform Netwealth in writing that I do not want my Financial Adviser to be my Adviser Representative (either by ticking the box below or by advising Netwealth in writing). My Financial Adviser may authorise officers or employees of the Financial Adviser to give Netwealth instructions in relation to my account. If my Financial Adviser changes their AFS Licensee, the Financial Adviser is authorised to continue as my Adviser Representative so long as the new AFS Licensee is registered by Netwealth. I have noted the important warning regarding Adviser Representatives in the relevant disclosure document. I confirm and agree to the release of Netwealth from liability in relation to actions by my Adviser Representative as described in the relevant disclosure document.

Tick this box only if you do **NOT** wish for the Financial Adviser to have authority to act as your Adviser Representative.

I do **NOT** wish for my Financial Adviser to be my Adviser Representative.

-  If you do not authorise your new Financial Adviser to act as your Adviser Representative your Financial Adviser will still have access to your account but will be unable to perform any transactions on your account, including through the use of smart enabled\*.

