

Change of name

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

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

You cannot change your name online and the offline transaction fee will not apply.

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

Step 2. Update of name

! Please attach certified documentary evidence of your change of name (i.e. marriage certificate, deed poll etc). In some circumstances, we may be required to request further documentary evidence.

Mr/Mrs/Miss/Ms/Dr/Other	<input type="text"/>	Family name	<input type="text"/>
Given name(s)	<input type="text"/>		

Step 3. Read and sign this client declaration

By submitting this instruction, I declare that all the details given in this form are true and correct.

! Please sign both your current signature and your new signature.

For **Netwealth Superannuation Master Fund** accounts this form is to be signed by the member.

For **Wrap Services** accounts companies may sign in accordance with their constitution and the law. If you require more than 2 signatories, please copy this page.

Account signatory one	<input type="text"/>		
Position/title	<input type="checkbox"/> Individual	<input type="checkbox"/> Director	<input type="checkbox"/> Sole director & sole company secretary
	<input type="checkbox"/> Other	<input type="text"/>	
Signature	<input type="text"/>	<input type="text"/>	Date <input type="text"/> / <input type="text"/> / <input type="text"/>

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Step 3. Read and sign this client declaration (continued)

Account signatory two (if applicable)	<input type="text"/>
Position/title	<input type="checkbox"/> Individual <input type="checkbox"/> Director <input type="checkbox"/> Company secretary <input type="checkbox"/> Other <input type="text"/>
Signature	<input type="text"/> Date <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/>

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

Step 4. 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](#)

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How to certify your documents

To create a certified copy of your document(s), one of the persons listed below must write the following on each page of the document(s):

- Certified true copy of the original
- Signature of approved certifier
- Printed name of certifier
- Qualification of approved certifier, e.g. Dentist, Justice of the Peace, etc.
- Date

Documents must have been certified within 12 months of us receiving it.

The following persons can certify your document(s):

- An officer with, or authorised representative of, a holder of an Australian financial services licence, having 2 or more years of continuous service with one or more licensees
- An officer with, or a credit representative of, a holder of an Australian credit licence, having 2 or more years of continuous service with one or more licensees
- Architect
- Chiropractor
- Dentist
- Financial adviser or financial planner
- Legal practitioner
- Justice of the Peace
- Medical practitioner
- Midwife
- Migration agent registered under Division 3 of Part 3 of the Migration Act 1958
- Nurse
- Occupational therapist
- Optometrist
- Patent attorney
- Pharmacist
- Physiotherapist
- Police officer
- Sheriff, including a Sheriff's officer
- Psychologist
- Trade marks attorney
- Veterinary surgeon

Other persons:

- A person who is enrolled on the roll of the Supreme Court of a State or Territory, or the High Court of Australia, as a legal practitioner (however described)
 - Accountant who is either:
 - (a) a fellow of the National Tax Accountants' Association; or
 - (b) a member of the following:
 - i. Chartered Accountants Australia and New Zealand
 - ii. The Association of Taxation and Management Accountants;
 - iii. CPA Australia; or
 - iv. The Institute of Public Accountants
 - Agent of the Australian Postal Corporation who is in charge of an office supplying postal services to the public
 - APS employee engaged on an ongoing basis with 2 or more years of continuous service who is not specified in another item in this list.
 - Australian Consular Officer or Australia Diplomatic Officer (within the meaning of the Consular Fee Act 1955)
 - Bailiff
 - Bank officer with 2 or more continuous years of service
 - Building society officer with 2 or more years of continuous service
 - Chief executive officer of a Commonwealth court
 - Clerk of a court
 - Commissioner for Affidavits
 - Commissioner for Declarations
 - Credit union officer with 2 or more years of continuous service
 - Employee of the Australian Trade and Investment Commission who is:
 - (a) in a country or place outside Australia; and
 - (b) authorised under paragraph 3(d) of the Consular Fees Act 1955; and
 - (c) exercising the employee's function at that place
 - Employee of the Commonwealth who is:
 - (a) at a place outside Australia; and
 - (b) authorised under paragraph 3(c) of the Consular Fees Act 1955; and
 - (c) exercising the employee's function at that place
 - Engineer who is a:
 - (a) member of Engineers Australia, other than at grade of student; or
 - (b) Registered Professional Engineer of Professionals Australia; or
 - (c) registered as an engineer under a law of the Commonwealth, a State or Territory; or
 - (d) registered on the National Engineering Register by Engineers Australia
 - Finance company officer with 2 or more years of continuous service
 - Holder of a statutory office not specified in another item in this list
 - Judge
 - Magistrate
 - Marriage celebrant registered under Subdivision C of Division 1 of Part IV of the Marriage Act 1961
 - Master of a court
 - Member of the Australian Defence Force who is:
 - (a) an officer; or
 - (b) a non-commissioned officer within the meaning of the Defence Force Discipline Act 1982 with 2 or more years of continuous service; or
 - (c) a warrant officer within the meaning of that Act
 - Member of the Australasian Institute of Mining and Metallurgy
 - Member of the Governance Institute of Australia Ltd
 - Member of:
 - (a) the Parliament of the Commonwealth; or
 - (b) the Parliament of a State or a Territory legislature; or
 - (c) a local government authority
 - Minister of religion registered under Subdivision A of Division 1 of Part IV of the Marriage Act 1961
 - Notary public, including these who are authorised as a notary public in a foreign country
 - Permanent employee of the Australian Postal Corporation with 2 or more years of continuous service who is employed in an office supplying postal services to the public
- (continued overleaf)

How to certify your documents (continued)

- Permanent employee of:
 - (a) the Commonwealth or a Commonwealth authority; or
 - (b) a State or Territory or a State or Territory authority; or
 - (c) a local government authority;with 2 or more years of continuous service who is not specified in another item in this list
- Person before whom a statutory declaration may be made under the law of the State or Territory in which the declaration is made
- Registrar, or Deputy Registrar, of a court
- SES employee of the Commonwealth
- Senior Executive Service employee of either:
 - (a) the Commonwealth or a Commonwealth authority; or
 - (b) a State or Territory or a State or Territory authority
- Teacher employed on a permanent full-time or part-time basis at a school or tertiary education institution