

# Data feed application



NWADADDFAF

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

The purpose of this form is to allow an authorised representative to request Netwealth begin sending data to a third party software provider set out in this form. Please note that the data feed will apply to all clients who are linked to the adviser code specified below unless you are selecting individual clients for Class Super and/or BGL 360 and/or SuperMate data feeds.

## Step 1. Provide adviser details

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

## Step 2. Select your Third Party Software Provider

You can select one or more of the following:

- |                                       |  |   |  |   |                                    |
|---------------------------------------|--|---|--|---|------------------------------------|
| <input type="checkbox"/> Xplan        | <input type="checkbox"/> OpenMarkets   | <input type="checkbox"/> Intelligent Office | <input type="checkbox"/> My Prosperity         | <input type="checkbox"/> Fin365               | <input type="checkbox"/> Plutosoft |
| <input type="checkbox"/> AdviserLogic | <input type="checkbox"/> Fincast       | <input type="checkbox"/> SuperMate          | <input type="checkbox"/> COIN                  | <input type="checkbox"/> PlatformPlus         | <input type="checkbox"/> SynCRM    |
| <input type="checkbox"/> PIMS         | <input type="checkbox"/> WealthConnect | <input type="checkbox"/> Complii            | <input type="checkbox"/> Viridian <sup>1</sup> | <input type="checkbox"/> Kearney <sup>1</sup> | <input type="checkbox"/> Xeppo     |
| <input type="checkbox"/> PAS          |  |   |  |   |                                    |

AND/OR one or more of the following:

- |   |    |   |
|---|----|---|
| <input type="checkbox"/> Class Super data feeds for all of my clients | OR | <input type="checkbox"/> Class Super data feeds for selected clients <sup>2</sup> |
| <input type="checkbox"/> BGL 360 data feeds for all of my clients     | OR | <input type="checkbox"/> BGL 360 data feeds for selected clients <sup>2</sup>     |
| <input type="checkbox"/> SuperMate data feeds for all of my clients   | OR | <input type="checkbox"/> SuperMate data feeds for selected clients <sup>2</sup>   |

<sup>1</sup> This option is limited to clients of this Third Party Software Provider only.

<sup>2</sup> You can select individual clients for Class Super, BGL 360 and/or SuperMate data feeds in your online adviser account using the Data Feed Settings function.

## Step 3. Terms and conditions

The provision of data feeds is subject to these Terms and Conditions as amended from time to time. By registering for data feeds, you accept these Terms and Conditions.

### 1. Currency and accuracy of information

While Netwealth has taken all reasonable care in producing the information for data feeds, subsequent changes in circumstances may occur at any time and may impact on the accuracy of the information. Neither Netwealth nor its' directors or employees give any warranty, make any representation as to, or accept responsibility for, the accuracy, reliability, timeliness or completeness of the information downloaded by this service now or in the future. It is your responsibility to check the information downloaded to verify its accuracy.

### 2. Third Party Software Providers

By registering for data feeds, you are instructing Netwealth to share client data with Third Party Software Providers. Netwealth is not responsible for the actions of such third parties and is not liable for any loss you or your client(s) may incur as a result of a third party's misuse of information it receives from Netwealth.

### 3. Client consent

You warrant that you have the consent of your clients to share the information contained in data feeds with Third Party Software Providers.

### 4. Data downloads

Netwealth will use its best efforts to transfer data to third parties on a regular basis depending on the specific Third Party Software Provider's requirements. However, there may be an interruption to the service to facilitate the site's maintenance or for any other reasons. Netwealth will not be liable to any person for interruptions to the service for any reason.

