

Licensee User nomination

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

The purpose of this form is to allow the AFS Licensee (where the AFS Licensee has entered into a 'Licensee Registration Agreement' with Netwealth) to nominate authorised personnel ('Users') to have online access to all Client accounts under the AFS Licensee and to carry out certain administration functions under the Licensee Registration Agreement. Acceptance of Your nomination is 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 Licensee 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 AFS Licensee details

AFS Licensee name	<input type="text"/>
Netwealth Licensee 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 AFS Licensee or otherwise ceases to be entitled to remain as a 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
Remuneration Reports only access: Allows users to view, access and download Remuneration Reports only

If You have more than four Users to nominate, please use another copy of this form.

All Users nominated for Full Access or Browse Only access below will be provided with access to all of Your Client accounts through the Netwealth Website.

All Users nominated for Remuneration Reports Only access will have limited access to Client accounts 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.¹

All fields for each User must be completed and signed by the User for access to be granted.

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"/> Director	<input type="checkbox"/> Company Secretary	<input type="checkbox"/> Authorised Representative	<input type="checkbox"/> Support staff	

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) Director Company Secretary Authorised Representative Support staff

Online access Remuneration Reports Only Full Access Browse Only Full Access (excluding withdrawals)

! 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 AFS Licensee, the User will ensure that all actions taken by the User will be duly authorised by the relevant Client and by the AFS Licensee.

User's signature Date / /

