Adviser Representative appointment

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

Important warning about the appointment of Adviser Representatives:

As your Adviser Representative will have full authority to act on your behalf on matters concerning your account and investments, it is essential that you have complete confidence in Your Financial Adviser handling your investments. If you have any doubts about this, you should not complete this Adviser Representative appointment.

This form may only be used if you have received a copy of the current product disclosure statement ('**PDS**') or IDPS Guide for the product or products to which the instruction relates. These documents contain important information regarding the appointment of an Adviser Representative which you should read. The current PDS or IDPS Guide is the version available on our website at the date this form is completed.

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

Step 1. Provide client details

Client name

Client number

Account number/s

Step 2. Nominate Adviser Representative

Adviser name

Adviser code

NW-ARA_0526

Step 3. Read and sign this client declaration

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). My Financial Adviser, as my Adviser Representative, 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.

By submitting this instruction, I represent to Netwealth that all the details in this form are true and correct and I declare that:

1. I have received, read and understood and agree to be bound by the terms and conditions under which an Adviser Representative is appointed set out in the relevant disclosure documents that are current as at the date I sign this form for the product or products to which this appointment relates;
2. I have noted the important warning included on this form regarding Adviser Representatives;
3. I confirm and agree to the release of Netwealth from liability in relation to actions by my Adviser Representative as described in the current relevant disclosure document; and
4. I authorise Netwealth to disclose to my Nominated Financial Adviser information regarding my investments held through the accounts.

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

Member

Signature

Date D D / M M / Y Y

For **Wrap Services** accounts this form is to be signed by all signatories to the account. For joint accounts all account holders must sign.

Account signatory one

Position/title

☐ Individual ☐ Director ☐ Sole director & sole company secretary

☐ Other

Signature

Date D D / M M / Y Y

Account signatory two (if applicable)

Position/title

☐ Individual ☐ Director ☐ Company secretary

☐ Other

Signature

Date D D / M M / Y Y

Companies may sign in accordance with their constitution and the law. If you require more than 2 signatories, please copy this page.

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

This transaction is not available online and the offline transaction fee will not apply to this transaction.

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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