

Important Update

Older versions of this form were decommissioned on **19 November 2025** and will no longer be accepted.

What's New

Advisers can now **link secondary users to accounts online**, removing the need for shared usernames.

For detailed instructions on linking or removing usernames, visit our **Knowledge Centre**:

<https://netwealth.zendesk.com/hc/en-us/articles/13496687104015-How-do-I-link-or-delink-a-username-to-accounts>

When to Use This Form

- To **link or delink** a **superannuation account** or **wealth accelerator account** that requires multiple signatories.
- To **nominate a different username** as the **primary user**.

Request to link or delink account(s) to a username

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

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

Use this form to link or delink an existing username to the nominated account(s) that require a signatory or signatories for authorisation, and to nominate the holder of the username as the primary user¹ of any account(s) proposed to be linked. If you wish to link or delink a username to more than four accounts, please complete and attach an additional form.

Note: Netwealth will only accept this form if it is signed and submitted by the account holder of the account(s) specified in Step 2 below, or by the attorney appointed by such account holder to sign and submit this form on their behalf under a power of attorney.

Step 1. Provide existing user details and sign the user declaration

The username specified below will be applied to all accounts nominated in Step 2.

Username

Full name

Date of birth / /

By signing this form, I represent to Netwealth that all the details provided in this Step 1 above are true and correct, and I declare that:

1. I acknowledge and understand that the username specified in this Step 1 is to be, and/or will cease to be (if applicable), a logon username of the account(s) nominated in Step 2;
2. I am the holder of the username specified in this Step 1;
3. I consent to the sharing of the username specified in this Step 1 and other relevant personal information belonging to me (including contact details) with any other users and their advisers associated with any account(s) linked to the username;
4. I agree to provide all information reasonably requested by Netwealth to meet its Anti-Money Laundering and Counter-Terrorism Financing (AML/CTF) obligations;
5. I understand that Netwealth may accept or reject any instruction specified in this form at its sole discretion; and
6. I accept that, to the maximum extent permitted by law, Netwealth will not be responsible to me or any other person for any liability, loss or damage arising out of or in connection with the linking or delinking of the username to the account(s) specified in Step 2.

Signature

Date / /

Step 2. Nominate account(s) to be linked or delinked

The individual online access levels and correspondence method associated with each of the accounts listed below will continue to apply after linking or delinking to the username specified in Step 1. Any changes to individual online access levels or correspondence methods can be done online².

Any other usernames linked to these Accounts will remain linked and can be viewed online.

If any other Netwealth account(s) exist under a client number listed below, the username specified above will be automatically linked to or delinked from those account(s). Furthermore, a linked username will also be automatically linked to any Netwealth accounts created in future under the same client number.

Account 1

I request to: Link this account Delink this account Nominate user specified in Step 1 as primary user³

Client name

Client number Account number

¹ Only the username holder who is also the account holder of an account proposed to be linked may be nominated as the primary user of such account. The primary user of an account will be given the 'full transaction' capability or 'browse' access for the account. All non-primary users will have 'read only' access level.

² Individual online access levels can only be updated online by advisers or their adviser user representatives.

³ Refer to the eligibility criteria outlined in footnote 1 under Step 1.

Request to link or delink account(s) to a username

Step 2. Nominate account(s) to be linked or delinked (Continued)

Account 2

I request to: Link this account Delink this account Nominate user specified in Step 1 as primary user³

Client name

Client number Account number

Account 3

I request to: Link this account Delink this account Nominate user specified in Step 1 as primary user³

Client name

Client number Account number

Account 4

I request to: Link this account Delink this account Nominate user specified in Step 1 as primary user³

Client name

Client number Account number

Step 3. Each account holder to read and sign this declaration

For **Netwealth Superannuation Master Fund** accounts, this form must be signed by each member.

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

By signing this form, I represent to Netwealth that all the details about the relevant account(s) provided in Step 2 above are true and correct, and I declare that:

1. I authorise the username specified in Step 1 to be and/or cease to be (if applicable) a logon username to access the relevant account(s) specified in Step 2;
2. I am giving such authorisation in the capacity of the account holder of the account(s) specified in Step 2, or in the capacity of the attorney appointed by such account holder give such authorisation on their behalf under a power of attorney;
3. I have the full legal capacity and power to give such authorisation and sign this form;
4. I understand that this authorisation will remain in place until such time that I notify Netwealth;
5. I understand that if I am acting under a power of attorney, I will provide Netwealth with a certified copy of the power of attorney document or any other relevant information reasonably requested by Netwealth;
6. I agree to provide all information reasonably requested by Netwealth to meet its Anti-Money Laundering and Counter-Terrorism Financing (AML/CTF) obligations;
7. I understand that Netwealth may accept or reject this instruction at its sole discretion;
8. I consent to the sharing of the details about the relevant account(s) specified in Step 2 and other relevant personal information belonging to me (including contact details) with the person specified in Step 1; and
9. I accept that, to the maximum extent permitted by law, Netwealth will not be responsible to me or any other person for any liability, loss or damage arising out of or in connection with the linking or delinking of the username to the relevant account(s) specified in Step 2.

