

Superannuation

Change of details

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

You cannot change your correspondence and transaction method online and the offline transaction fee will not apply to these changes. All other changes allowed on this form can be performed online. The offline transaction fee will apply if you choose to make these changes offline using this form.

If you do not currently have online access to your Netwealth account you can contact your adviser to arrange the change or arrange online access for future transactions in Step 3 of this form.

 You should read the current Product Disclosure Statement 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 Product Disclosure Statement is available on our website.

Step 1. Provide member details

Client name																														
Client number							Account number																							
Client number							Account number																							

Step 2. New contact details¹ (if applicable)

Residential address ²																														
Suburb/town																														
State				Postcode				Country (if not Australia)																						
Postal address (if different from above)																														
Suburb/town																														
State				Postcode				Country (if not Australia)																						
Phone	Home () Work ()																													
Mobile ³																														
Email ³																														

 If you currently receive communications by post and provide an email address above, you will automatically receive communications electronically unless you select 'Post' as your communication method in Step 3.

1 These contact details cannot be the contact details of your adviser.
2 If you now reside in the European Union or United Kingdom, we are unable to accept any future requests to transfer international securities to your account.
3 If a new mobile phone number and/or email address is provided above, this form must be signed by the client and cannot be completed by an Adviser Representative.

Step 3. Update online access and communication election

To change your preferred online access and communication method

Level of online access (please select one) ☐ Transact ☐ Browse only

Communication method (please select one) ☐ Electronically⁴ ☐ Post⁵

You elect to receive your Annual Member Statement and to confirm transactions by accessing your online account, unless you choose the following:

☐ I request that my Annual Statements and Confirmation Statement be sent to me by the communication method selected above.

To stop having regular statements sent to you

If you have online access and your Annual Member Statement and Confirmation Statements are currently sent to you, either electronically or by post, you can elect to access the information online and to stop having these statements sent to you:

☐ I elect to access my Annual Member Statement online and to confirm transactions in my online account and I do not want my Annual Member Statement or Confirmation Statements to be sent to me.

⁴ Receiving communications electronically means by a SMS sent to your mobile phone number, an email sent to your email address, an attachment to an email sent to your email address, or notification to you by email or SMS that the communication is available for you to access in your secure online account or on our website. Communications include all letters, statements, confirmations and other notices.

⁵ If you select to receive communications by post you must provide a mobile phone number in Step 2.

Step 4. Provide new Income Stream payment details (gross of any tax) (if applicable)

Nominate payment frequency

Payment frequency (please tick one box) ☐ Weekly ☐ Fortnightly ☐ Monthly

☐ Quarterly ☐ Half yearly ☐ Yearly

Payment to commence DD / MM / YY

If you are investing between 1 June and 30 June, you can defer the commencement of your payments until next financial year.

 If the scheduled payment date is not a business day your payment will be made on the previous business day.

Standard Income Stream / Transition to Retirement Income Stream

Amount of income stream now required (please tick one box below and where applicable, nominate the amount you wish to receive per payment).

☐ Nominated amount – specify the amount you wish to receive for each payment: \$, . 0 0 per period

OR

☐ Minimum annual income stream⁶ OR ☐ Maximum annual income stream⁷

(Note the maximum option is applicable to Transition to Retirement income streams only)

 If you enter an amount that, on an annual basis, is less than your minimum annual income stream, we will pay your minimum annual income stream. If you enter an annual Transition to Retirement Income Stream amount greater than your maximum annual income stream, we will pay your maximum annual income stream.

⁶ If there is less than a full year from the start of your income stream to the next 30 June, you will receive the minimum annual amount reduced on a pro rata basis.

⁷ If there is less than a full year from the start of your income stream to the next 30 June, you will receive the full maximum amount over the remainder of the year.

Term Allocated Pension

Term selected years

Amount of pension required (please tick one box)

☐ Fixed calculated amount

OR ☐ 90% of the fixed calculated amount

OR ☐ 110% of the fixed calculated amount

OR ☐ Nominated annual amount in allowable 90-110% range \$, . 0 0 p.a.

Step 5. Add, change or remove a reversionary pensioner nomination (if applicable)

Please provide reversionary pensioner details if you wish to add or change a reversionary pensioner. A reversionary pensioner must be a superannuation dependant (however, special rules apply to children). See 'Information Guide 2: Additional Information about Superannuation' for details. An attorney acting under a Power of Attorney is unable to nominate themselves as a reversionary.

 This will override any binding death benefit direction currently recorded on your account.

Full name																													
Address																													
Suburb/town																													
State			Postcode				Country (if not Australia)																						
Date of birth			/			/																							
Relationship	☐	Spouse/de facto					☐	Child					☐	Interdependent					☐	Financial dependent									
☐ If you wish to remove a reversionary pensioner, please tick this box.																													

Step 6. Read and sign this client declaration (where this form is completed by an Adviser Representative on the account, go to Step 7)

If a new mobile phone number and/or email address is provided at Step 2 or a new reversionary pensioner is provided at Step 5, the client must sign.

By submitting this instruction, I represent to Netwealth that all the details in this transaction 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 set out in the relevant Product Disclosure Statement for the Netwealth Superannuation Master Fund current as at the date I sign this form; and
2. I authorise Netwealth to disclose to my Nominated Financial Adviser (if applicable) information regarding this transaction and/or my investments held through the Netwealth Superannuation Master Fund.

Member full name																												
Signature																												
Date			/			/																						

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

Step 7. Read and sign this adviser declaration (To be completed by an Adviser Representative providing instruction on behalf of the client)

If a new mobile phone number and/or email address is provided at Step 2 or a new reversionary pensioner is provided at Step 5 this form must be signed by the client and cannot be completed by an Adviser Representative.

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

1. I am the nominated Adviser Representative for this client, my appointment has not been revoked and the client has authorised me to submit this instruction as the client's agent; and
2. I acknowledge that this transaction is governed by the terms and conditions for such transactions as set out in the relevant Product Disclosure Statement for the Netwealth Superannuation Master Fund current as at the date I sign this form.

 You should give your client the current Product Disclosure Statement for the product in which this account is held.

Adviser Representative																												
Signature																												
Date			/			/																						

Step 8. 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](#)