

Superannuation

Regular contribution plan



NWNEWBRCPI

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

This transaction is available online. The offline transaction fee will apply if you choose to undertake this transaction offline using this form. If you do not currently have online access to your Netwealth account, you can contact your adviser to arrange the transaction or arrange online access using a 'Change of details' form available from our website.

! 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	<input type="text"/>
Client number	<input type="text"/>
Netwealth account number	<input type="text"/>

Step 2. Provide regular contribution plan instructions

I wish to stop the existing regular contribution plan (go to Step 4, or if you are an Adviser Representative, go to Step 5).

OR

I wish to commence or change regular monthly contributions to my cash account.

How much would you like to contribute each month? \$ (minimum of \$100 per month)

When would you like your regular contribution plan to begin? /

Concessional contributions

Superannuation guarantee contributions (employer)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Salary sacrifice contributions (employer)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Non-concessional contributions

Personal contributions ¹	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Spouse contribution (personal)	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Total of all regular monthly contributions	\$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

We will debit your bank account on the 15th of each month or the next business day if the 15th day is not a business day.

¹ If you wish to claim a tax deduction for some or all of your contributions, you will need to submit a valid 'Notice of intent to claim or vary a deduction for personal super contributions' form issued by the Australian Tax Office for the contributions you intend to claim as a tax deduction. Alternatively, you will have the opportunity to claim a tax deduction for your personal contribution at the end of the financial year when Netwealth sends you a section 290.170 notice. For more information on the conditions which must be met for claiming a deduction, go to www.ato.gov.au and search for 'claiming deductions for personal super contributions'.

Bank account from which regular contribution plan direct debits are to be made

Direct debit my regular contribution from the nominated bank account currently recorded on my account.

OR

Name of financial institution	<input type="text"/>
Account name	<input type="text"/>
BSB	<input type="text"/> - <input type="text"/>
Account number	<input type="text"/>

Step 3. Read and sign this financial institution account holder declaration

You request and authorise Netwealth Investments Limited (Debit User ID 246628) to arrange, through its own financial institution, for any amount Netwealth Investments Limited may debit or charge you to be debited through the Bulk Electronic Clearing System from an account held at the financial institution identified above and paid to the Debit user, subject to the terms and conditions of the Client Service Agreement (overleaf) and any further instructions detailed on this form.

Financial institution account signatory 1

Name and capacity

Signature Date / /

Financial institution account signatory 2 (if necessary)

Name and capacity

Signature Date / /

If signing for a company, sign and print full name and capacity for signing (e.g. Director).

Step 4. Read and sign this client declaration (where this form is completed by an Adviser Representative on the account, go to Step 5)

(If new bank account details are supplied in Step 2, 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 am eligible to contribute or have contributions made on my behalf to the Fund under superannuation law¹; and

I further declare that:

- 3. 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
- 4. I authorise Netwealth to disclose to my Financial Adviser (if applicable) information regarding this transaction and/or my investments held through the Netwealth Superannuation Master Fund.

Member

Signature Date / /

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

¹ If your circumstances change and you are no longer eligible to contribute you must notify Netwealth and stop your regular contribution plan.

Client Service Agreement – Direct debit

Definitions

account means the account held at **your financial institution** from which we are authorised to arrange for funds to be debited.

agreement means this Client Service Agreement between **you** and **us** with regard to direct debit arrangements.

non-business day means a Saturday or a Sunday or a public holiday listed throughout Australia.

debit day means the day that payment by **you** to **us** is due.

direct debit request means the direct debit request between **us** and **you**.

us or **we** means Netwealth Investments Limited (the debit user) you have authorised by signing a **direct debit request**.

you means the customer who signed the **direct debit request**.

your financial institution is the financial institution where **you** hold the **account** that **you** have authorised **us** to arrange to debit.

Drawing arrangements

We will only arrange for funds to be debited from your account as authorised in the direct debit request. Where the debit date falls on a non-business day, we will draw the amount on the next business day.

We will not change any details of drawings arrangements without giving you at least fourteen (14) days' written notice.

We reserve the right to cancel the direct debit arrangements if three or more drawings are returned unpaid by your nominated financial institution and to arrange with you an alternate payment method.

We will keep all information pertaining to your nominated account at the financial institution, private and confidential.

Your rights

You may terminate your direct debit arrangement at any time by giving signed written notice directly to us. Notice to us should be received by us at least two (2) business days prior to the due date.

You may stop a debit to your account under your direct debit arrangement by giving signed written notice directly to us. Notice given to us should be received by us at least two (2) business days prior to the due date.

You may request a change to the drawing amount by contacting us and advising your requirements no less than two (2) business days prior to the due date.

Where you consider that a drawing has been initiated incorrectly (outside your direct debit arrangement) you may take the matter up directly with us, or lodge a direct debit claim through your nominated financial institution.

Your responsibilities

It is your responsibility to ensure that sufficient funds are available in the nominated account to meet a drawing on its due date. If there are not sufficient funds in the nominated account a bank dishonor fee may be recovered from your account.

It is your responsibility to ensure that the authorisation given to draw on the nominated account is identical to the account signing instruction held by the financial institution where the account is based.

It is your responsibility to advise us if the account nominated by you to receive the direct debit arrangement is transferred or closed.

It is your responsibility to advise us of a suitable alternate payment method if you wish to amend your direct debit arrangement (where necessary).

All changes or queries regarding this agreement or your direct debit arrangement should be directed to our investor services team on 1800 888 223 or in writing to:

 contact@netwealth.com.au

 [Netwealth Superannuation Master Fund, Reply Paid 336, South Melbourne VIC 3205](#)