

# Superannuation Rollover/transfer request

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

This form enables you to rollover or transfer benefits from another superannuation fund to the Netwealth Superannuation Master Fund.

**Warning about insurance benefits.** The superannuation fund you are transferring from may provide you with insurance against death, illness or injury in the form of life insurance, disability insurance or income protection insurance. When you submit this form and transfer benefits you may lose any insurance entitlements you have. You should consider any insurances you may lose as a result of this transfer.

If you are a direct client with online access you can initiate a rollover from another superannuation fund online. The offline transaction fee will not apply if you undertake this transaction offline using this form.

**⚠** You should read the current Product Disclosure Statement for the product in which your account is held before submitting this form as there may have been changes to the terms and conditions governing this transaction. The Product Disclosure Statement contains important information about the Netwealth Superannuation Master Fund which will help you understand the product and decide if it is appropriate to your needs. The current Product Disclosure Statement is available on our website.

## Step 1. Provide your Netwealth account to rollover to

Netwealth account number (if known)

## Step 2. Provide your personal details

Mr/Mrs/Miss/Ms/Dr/Other  Family name<sup>1</sup>

Given name(s)

Date of birth  /  /  Sex  Male  Female

Tax file number  -  -

Under the *Superannuation Industry (Supervision) Act 1993*, you are not obliged to disclose your tax file number, but there may be financial consequences if you do not. Refer to the Product Disclosure Statement for more information.

<sup>1</sup> Please attach certified documentary evidence if your name has changed (i.e. marriage certificate, deed poll, etc).

## Step 3. Provide details of the fund you are transferring from

Complete details of each of the funds you are transferring from. If you have more than five super funds to transfer from, please complete a separate form. If you are transferring from a Self Managed Super Fund, please see Step 4.

Death benefit rollover<sup>2</sup>

<sup>2</sup> Please tick this box if the rollover is from the proceeds of a Death Benefit and attach a Death Benefit Rollover Benefit Statement.

Fund/product name

Unique Super Identifier (USI)  ABN

Member number

Full rollover/transfer  OR  Partial rollover/transfer amount \$

Fund/product name

Unique Super Identifier (USI)  ABN

Member number

Full rollover/transfer  OR  Partial rollover/transfer amount \$

Fund/product name

Unique Super Identifier (USI)  ABN

Member number

Full rollover/transfer  OR  Partial rollover/transfer amount \$



Step 6. Nominate and consent to member advice fees

A reference to your Adviser means the Nominated Financial Adviser on your account. By completing this section:

- You provide consent to Netwealth to arrange the deduction of fees from your account for payment to your Adviser; and
- You authorise and direct Netwealth to pay the member advice fees set out in this form to the AFS Licensee for whom your Adviser acts as an authorised representative (whoever that may be from time to time) and you consent to some or all of this amount being paid by the AFS Licensee to your Adviser (or their nominee).

Consent to deduct fees

Your consent is being sought by Netwealth to deduct the member advice fees in this Step from your Netwealth Superannuation Master Fund account. Your consent will last until the amount has been deducted from your account.

These fees are for services provided to you by your Adviser. Your Adviser is required to obtain your written consent before the ongoing fees can be deducted from your account. This form can be used to provide that consent.

If you are not happy with the amount described, you do not have to sign this form, in which case the fees will not be paid to your Adviser. You may withdraw your consent prior to the fee deduction occurring by contacting Netwealth by email at [contact@netwealth.com.au](mailto:contact@netwealth.com.au) or calling 1800 888 222.

You may vary or withdraw your consent to deduct fees at any time by contacting your Adviser in writing or notifying Netwealth.

Member advice fees can only be paid from your superannuation account for personal advice services provided to you by your Adviser specifically in relation to your superannuation account. A separate consent form must be provided for each account, and the advice fees can only be charged in accordance with your consent.

Adviser name

Adviser code

Adviser Email

Adviser Phone (  )

AFS Licensee name

AFS Licensee number

Upfront member advice fee (including GST)

Please provide the details of any upfront member advice fees that you agree with your Nominated Financial Adviser, including GST.

Fixed percentage rate  % This will apply to the total rollovers/transfers shown on this form.

Your Adviser estimates that this fee will be approximately \$

This is based on the total rollovers expected to be received in your account, as estimated by your Adviser.

AND/OR

Fixed dollar amount \$  This amount is a one-off fee.

This fee applies to the rollovers/transfers listed on this form only and is applied upon receipt of the rollovers/transfers<sup>1</sup>.

<sup>1</sup> The fixed dollar upfront fee is deducted upon receipt of the first rollover/transfer where there is sufficient funds available to deduct this fee.



Step 8. Provide any additional instructions

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Upload via your online account:  [Activities & Tasks > Document Upload](#)

For more information:  [netwealth.com.au](https://netwealth.com.au)

 1800 888 223

 Your adviser