

Step 6. Provide notice of intent to claim a tax deduction for personal contributions

This section is mandatory if you have made any personal non-concessional contributions into your Netwealth account in the last two financial years.

If you are seeking to claim a tax deduction for personal non-concessional contributions made to your Netwealth Personal Super account, you must submit a 'Notice of intent to claim or vary a deduction for personal super contributions' form to Netwealth before you commence your income stream.

This applies to any personal contributions made in the current financial year, and to any personal contributions made in the previous financial year for which you have not yet submitted a 'Notice of intent to claim or vary a deduction for personal super contributions' form or Section 290.170 Notice to Netwealth.

A copy of the 'Notice of intent to claim or vary a deduction for personal super contributions' form is available on our website, or by contacting Netwealth.

⚠ Once you have transferred all or part of your account to an income stream Netwealth will be unable to accept a 'Notice of intent to claim or vary a deduction for personal super contributions' form or Section 290.170 Notice from you, and you will not be eligible to claim a tax deduction for those personal contributions.

If you require any clarification, please contact your financial adviser or Netwealth prior to submitting this form.

Please tick one of the following options:

- Yes I intend to claim a deduction and have attached a 'Notice of intent to claim or vary a deduction for personal super contributions' form.
- No I do not wish to claim a tax deduction for my personal contributions.

Step 7. Claim your tax-free threshold and/or notify your Tax File Number ('TFN')

If you are age 60 and above⁷, this section does not apply to you. Please proceed to Step 8.

If you are under 60, do you want to claim the tax-free threshold from your Netwealth income stream?

- Yes – Please complete the enclosed ATO 'Tax File Number Declaration' form and submit it attached to this form⁸.
- No – You may want to provide your Tax File Number, if you have not previously done so. To provide your TFN please complete a 'Tax File Number Notification' form available from our website and attach it to this form.

⁷ If you are over 60, no PAYG tax will be deducted from your income and no additional ATO forms are required.

⁸ Only claim the tax-free threshold from one payer at a time, unless your total income from all sources for the financial year will be less than the tax-free threshold.

Step 8. Nominate bank account details

⚠ You can only nominate a bank account that is held in your name or a joint bank account for which you are one of the account holders. Payments will not be made to third parties.

Provide the bank account any income stream payments are to be made to (if applicable). If left blank, income stream payments will be made to the nominated bank account currently recorded for your account.

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

Step 9. Member advice fees

Please select the fee option that will apply to your new account:

Fixed term advice fee


 If no instruction is provided below, the current fixed term fee arrangement will remain active on the account listed in Step 1.

Please transfer the same fixed term member advice fee from my existing account (as listed in Step 1) to my new account.


By ticking this box, the consent to pay advice fees previously provided in relation to the account listed in Step 1 continues to apply to the interest in the Fund which is being transferred to the new account.

OR I wish to nominate new fixed term member advice fees for my new account (**please complete the relevant fixed term member advice fee consent form**).

Ongoing advice fee

 If no instruction is provided below, the current ongoing fee arrangement will remain active on the account listed in Step 1.

Remove the ongoing advice fee arrangement from the account listed in Step 1.

 Ongoing advice fees on the new account (created in Step 2): Please complete the relevant ongoing member advice fee consent form/s, available on the Netwealth website, to nominate and provide consent to member advice fees after the transfer has been completed and the *new account number is known*.


Step 10. Automatic Adviser Representative nomination and agency agreement

I nominate my Financial Adviser 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) unless I inform Netwealth in writing that I do not want my Nominated Financial Adviser to be my Adviser Representative (either by ticking the box below or by advising Netwealth in writing). My Nominated Financial Adviser may authorise officers or employees of the Nominated Financial Adviser to give Netwealth instructions in relation to my account. If my Nominated Financial Adviser changes their AFS Licensee, the Nominated Financial Adviser is authorised to continue as my Adviser Representative so long as the new AFS Licensee is registered by Netwealth. I have noted the important warning regarding Adviser Representatives in the Product Disclosure Statement.

I confirm and agree to the release of Netwealth from liability in relation to actions by my Adviser Representative as described in the Product Disclosure Statement.

Tick this box only if you do **NOT** wish for your Nominated Financial Adviser to have authority to act as your Adviser Representative.

I do **NOT** wish for my Nominated Financial Adviser to be my Adviser Representative.

 If you do not authorise your Nominated Financial Adviser to act as your Adviser Representative your Nominated Financial Adviser will still have access to your account but will be unable to perform any transactions on your account, including through the use of smart enabled®.

