

Third party authority for personal representatives



NWCLMATPLA

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

Complete this form to authorise a family member or other representative of a personal nature ("Third Party") as a Third Party Personal Representative who can seek information from Netwealth about your account. The Third Party will not be able to transact on your account or provide instructions to Netwealth on your behalf.

This form cannot be used to authorise third parties of a professional nature e.g. your financial adviser, lawyer or accountant. Professional third parties must be authorised via the Netwealth website.

A You should read the current disclosure documents 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 disclosure documents are available on our website.

Step 1. Provide client details

Client name

Client number

Account number(s)¹

☐ Tick this box to authorise the Third Party nominated in Step 2 to have access to information on all accounts you hold with Netwealth.

¹ The Third Party will only have access to information on the listed account/s if access to all accounts is not selected.

Step 2. Nominate a Third Party Personal Representative

Name of Third Party

Relationship to client

☐ Power of Attorney ☐ Legal Guardian ☐ Spouse/Partner ☐ Other family member (specify relationship below)

Is the Third Party a Netwealth client?

☐ Yes ☐ No

If yes, please provide Netwealth details

Client numberAccount number

Residential address

Suburb/town

StatePostcodeCountry (if not Australia)

Contact Phone

Home () Work ()

Mobile

Email

(Optional) If you wish to limit the term of this authority, please enter an expiry date below. If left blank or if a valid date is not provided, **this authority will remain valid until revoked.**

☐ This Third Party Personal Representative authority is valid until:

Date / /

If you wish to nominate an additional Third Party Personal Representative, please copy this page.

1. I have received, read and understood and agree to be bound by the terms and conditions set out in the relevant disclosure documents that are current as at the date I sign this form for the product or products to which this appointment relates;
2. I authorise Netwealth to provide information about my Netwealth account/s to the Third Party nominated in Step 2;
3. I acknowledge that Netwealth is not responsible for any loss and/or liabilities which may result from Netwealth providing information about my Netwealth account/s to the Third Party, except where, and to the extent, any such loss or liabilities were directly caused by Netwealth's negligence, fraud or wilful misconduct; and
4. I authorise Netwealth to disclose to my Financial Adviser (if applicable) information regarding this transaction and/or my investments held through the relevant accounts.

Date / /

Date / /

Date / /

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

Step 5. Once completed please send to us

Netwealth Investments Limited, Reply Paid 336, South Melbourne VIC 3205

Activities & Tasks > Document Upload > Other (Advisers only)

Your adviser