

# Wrap Services

## Change of nominated bank account



NWNBWSWCNB

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

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

This transaction is available online, however the offline transaction fee will not apply if you choose to undertake this transaction offline using this form.

**!** 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 your Netwealth account details

Client name

Client number  Netwealth account number  W R A P

### Step 2. Update nominated bank accounts for payments out

If you have a regular savings plan and/or anytime direct debit request that is being debited from a nominated bank account you are updating below, you must also complete a new 'Regular savings plan' form and/or a new 'Direct debit request' form to update the bank account for those transactions.

Please note that, if you change your nominated bank account/s, no proceeds can be paid to your new account until we have validated the change of account to our satisfaction.

You should ensure that your nominated bank accounts are accounts held in your name or that of a related party.

#### Nominated bank account

Name of financial institution

Account holder/s name

BSB  -  Account number

OR  Remove the nominated bank account currently recorded on my account.

#### Additional nominated bank account

Name of financial institution

Account holder/s name

BSB  -  Account number

Adding an additional nominated bank account to your Netwealth account allows you or your adviser to instruct us to pay a withdrawal to this account online. You are able to add and remove your nominated bank account, regular payment bank account or additional nominated bank accounts online at [www.netwealth.com.au](http://www.netwealth.com.au).

#### Bank account into which regular payments are to be paid

Nominated bank account as above  Additional nominated bank account as above

OR

Name of financial institution

Account holder/s name

BSB  -  Account number

**Step 3. Read and sign this client declaration**

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 disclosure documents that are 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 Wrap Services.

**Account signatory one full name**

**Position/title**  Individual  Director  Sole director & sole company secretary  
 Other

**Signature**  Date  /  /

**Account signatory two (if applicable)**







**Position/title**  Individual  Director  Company secretary  
 Other

**Signature**  Date  /  /

Companies may sign in accordance with their constitution and the law. If you require more than 2 signatories, please copy this page.  
It is recommended that you retain a copy of the completed form for your own records.

**Step 4. Once complete please send to us**

This original form must be mailed to Netwealth. If you have an adviser, your adviser may upload this form via their adviser dashboard online.

- Send to us:**  [contact@netwealth.com.au](mailto:contact@netwealth.com.au)  [Netwealth Investments Limited, Reply Paid 336, South Melbourne VIC 3205](#)  
 [Activities & Tasks > Document Upload > Change of Details \(Advisers only\)](#)
- For more information:**  [netwealth.com.au](http://netwealth.com.au)  [1800 888 223](tel:1800888223)  [Your adviser](#)