

# Wrap Services

## Direct debit request



NWNBWSIWDD

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

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

**⚠** 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. Provide payment details

This instruction relates to (please tick one or more boxes as applicable):

Once only amount of \$

AND/OR

Any amount advised, from time to time, by me or my Adviser Representative (if I have one) to Netwealth.

### Step 3. Provide details of account to debit

Authority to debit the account named below to pay Netwealth Investments Limited

Name of financial institution

Account holder/s name

BSB  -  Account number

### Step 4. Read and sign this declaration

You request and authorise Netwealth Investments Limited (Debit User ID 246627) 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 5. Once complete please send to us

**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 Your adviser

## 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](mailto:contact@netwealth.com.au)

 [Netwealth Investments Limited, Reply Paid 336, South Melbourne VIC 3205](#)