

Wealth Accelerator Premium Service and Wholesale Client Certification

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

If you are a Wholesale Client, you may use the Premium Service as set out in Portfolio Service Guide 2: Premium Service for Wholesale Clients. The Corporations Act sets out certain rights for retail clients to be given certain information about financial products and services, including disclosures about risks and costs, and for retail clients to have access to dispute resolution schemes. By using Wealth Accelerator as a Wholesale Client, you will not be using Wealth Accelerator as a retail client and you may forgo the rights pertaining to retail clients.

Step 1. Provide Wholesale Client details

Client name

Client number (if known) Account number (if known)

I apply to use the Premium Service as a Wholesale Client.

Type of Wholesale Client: Accountant Certified ¹ Professional Investor

Please tick the applicable boxes:

A holder of an Australian Financial Services Licence

AFSL No.

A body registered under the Financial Corporations Act 1974

A person who controls assets of at least \$10 million ²

A listed entity or related body corporate of a listed entity

Other (as defined in Section 9 of the Corporations Act)

¹ You will also need to submit a certification from a qualified accountant and a 'Certificate of control of trust or company' form if applicable.

² Evidence for each professional investor is required to understand their position and is required before wholesale status will be applied.

Step 2. Read and sign this client declaration

By submitting this certificate, I declare that:

1. I represent to Netwealth that all the details in this certificate are true and correct and I will notify Netwealth if I cease to meet the criteria selected above;
2. I represent to Netwealth that I will be using Wealth Accelerator as a Wholesale Client and, unless I am a Professional Investor (as defined in the Corporations Act), I represent to Netwealth that my Wealth Accelerator account is not for use in connection with a business;
3. I understand that Wealth Accelerator is not provided to me as a retail client for the purposes of the Corporations Act and, as I am not a retail client, I will not have some of the rights and protections that apply to retail clients and I will not be entitled to or receive some of the disclosures that are required to be provided to retail clients under the Corporations Act;
4. I understand that, despite anything to the contrary contained in the Disclosure Documents, as I am a Wholesale Client, Netwealth is not required to give me a product disclosure statement or other disclosure document for any managed funds or other financial products that I choose to invest in through Wealth Accelerator and that Netwealth may acquire investments on my behalf for which there is no product disclosure statement or other disclosure documents; and
5. I release Netwealth and its directors, employees and associates (each, an "**Indemnified Person**") from, and indemnify each Indemnified Person against, any claim, loss or liability incurred by an Indemnified Person and arising in connection with Netwealth providing Wealth Accelerator to me as a Wholesale Client, except to the extent that the claim, loss or liability was caused by Netwealth's negligence or wilful default. Netwealth holds the benefit of this indemnity on trust for each other Indemnified Person.

Step 2. Read and sign this client declaration (continued)

Name

Signature Date / /

Name


Signature Date / /

Step 3. Once completed please send to us via our secure online document upload facility

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

For more information:  netwealth.com.au

 1800 888 223

 [Your adviser](#)