

Wrap Services

Foreign currency withdrawal



NWREDEIMCW

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

In this form references to 'I', 'me', 'my' and 'you' apply to each client, and where applicable, to each signatory.

! 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	<input type="text"/>																									
Client number	<input type="text"/>						Account number	<input type="text"/>						<input type="text"/>												

Step 2. Provide the amount and currency you would like sent (paid out of your Netwealth account)

Amount to be sent

Foreign amount to be sent - Please select the amount to withdraw in the below foreign currency

☐ Please pay this amount in the below currency:

OR

Australian Dollars (AUD) to be sent - Please pay AUD by international telegraphic transfer

☐ Please pay this **AUD** amount in the below currency: **AUD**

Currency to be sent - Please pay by international telegraphic transfer in the following currency:

<input type="checkbox"/> Cash Account (AUD)	<input type="checkbox"/> US Dollars (USD)	<input type="checkbox"/> GB Pounds (GBP)	<input type="checkbox"/> Euro Dollars (EUR)
<input type="checkbox"/> Japanese Yen (YEN)	<input type="checkbox"/> NZ Dollars (NZD)	<input type="checkbox"/> HK Dollars (HKD)	<input type="checkbox"/> Swiss Francs (CHF)
<input type="checkbox"/> Canadian Dollars (CAD)	<input type="checkbox"/> Danish Krone (DKK)	<input type="checkbox"/> Other	<input type="text"/>

Step 3. Provide the currency the withdrawal should be funded by (FX/AUD cash holdings within your Netwealth account)

Select funding currency - Please fund the amount in Step 2 from the following currency held in my account.

<input type="checkbox"/> Cash account (AUD)	<input type="checkbox"/> US Dollars (FXUSD)	<input type="checkbox"/> GB Pounds (FXGBP3)	<input type="checkbox"/> Euro Dollars (FXEUR)
<input type="checkbox"/> Japanese Yen (FX Yen)	<input type="checkbox"/> NZ Dollars (FXNZD)	<input type="checkbox"/> HK Dollars (FXHKD)	<input type="checkbox"/> Swiss Francs (FXCHF)
<input type="checkbox"/> Canadian Dollars (FXCAD)	<input type="checkbox"/> Danish Krone (FXDKK)		

! Where no selection is made the payment will be made from your cash account (AUD).

Step 4. Nominate where you would like your transfer paid to

Pay to a bank account - your cash withdrawal will be paid to the account you nominate

☐ Pay to the international bank account below and accept future instructions from my authorised Adviser Representative/s to this account;

OR ☐ Pay to the international bank account below. Do NOT accept any instructions to pay this account without my authorisation.

! Where you have not previously authorised a payment to this international bank account, the original of this form needs to be returned to Netwealth or securely uploaded by your Adviser Representative via the Document Upload Facility. For security reasons we may contact you to validate this request before completing your withdrawal.

Step 4. Nominate where you would like your transfer paid to (continued)**International Bank details**

Name of financial institution	<input type="text"/>
Address of financial institution	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
BIC/Swift Code ¹	<input type="text"/>
Bank/Routing/Sort Code (where applicable)	<input type="text"/>

¹ The first 8 characters of a Bank Identifier Code (BIC) or Swift code identify the receiving bank and country it is located in. The last 3 characters identify the office, division or branch within the bank. Where you are only aware of the first 8 characters, please add "XXX" after the known characters to identify the receiving bank's primary office.

Payee details

Account holder's name	<input type="text"/>
Address of account holder	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
IBAN / Account number	<input type="text"/>
Contact number	<input type="text"/>
Payee reference (where applicable)*	<input type="text"/>

*The Payee reference is the information added to the payment in ANZ. It's important to note that this is distinct from the reason for payment.

Reason for payment

<input type="text"/>
<input type="text"/>
<input type="text"/>

Step 5. Read and sign this client declaration (where this form is completed by an Adviser Representative on the account, go to Step 6)

 If new bank details are provided at Step 4 the client must sign.

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;
2. I understand that the transfer, even if sent to and from the same currency, will be reflected on my account in Australian Dollars;
3. I accept that additional fees and costs may be incurred in making this transfer, and that any costs incurred by Netwealth will be charged against my account; and
4. 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

<input type="text"/>
<input type="text"/>

Position/title

<input type="checkbox"/> Individual	<input type="checkbox"/> Director	<input type="checkbox"/> Sole director & sole company secretary
<input type="checkbox"/> Other	<input type="text"/>	

Signature

Date / /

Step 5. Read and sign this client declaration (continued)


Account signatory two (if applicable)	<input type="text"/>																									
	<input type="text"/>																									
Position/title	<input type="checkbox"/> Individual	<input type="checkbox"/> Director	<input type="checkbox"/> Company secretary																							
	<input type="checkbox"/> Other	<input type="text"/>																								
Signature	<input type="text"/>																									
	Date	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>														

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.


This transaction is not available online and the offline transaction fee will not apply to this transaction.

Step 6. Read and sign this adviser declaration (to be completed by an Adviser Representative providing instruction on behalf of the client)

 If new bank details are provided at Step 4 the client must sign.

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 am the nominated Adviser Representative for this client, my appointment has not been revoked and the client has authorised me to submit this instruction as the client's agent;
2. I acknowledge the terms stipulated within the client declaration and accept that my client is aware and accepts the terms as stipulated; and
3. I acknowledge that this transaction is governed by the terms and conditions for such transactions as set out in the relevant disclosure documents current as at the date I sign this form.



 You should give your client the current disclosure documents for the product in which this account is held.


Adviser Representative	<input type="text"/>																									
	<input type="text"/>																									
Signature	<input type="text"/>																									
	Date	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>														

Step 7. Once complete please send to us




If you have provided new bank account details, either the original form must be mailed to us or uploaded using our secure document upload tool. Otherwise you may send the form using any method below.

Send to us:

 contact@netwealth.com.au  [Netwealth Investments Limited, Reply Paid 336, South Melbourne VIC 3205](#)

 [Activities & Tasks > Document Upload > Wrap Withdrawal \(Advisers only\)](#)

For more information:

 netwealth.com.au  [1800 888 223](tel:1800888223)  [Your adviser](#)