Super Accelerator
Core/Plus account transfer

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

⚠ You should read the current Product Disclosure Statement 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 Product Disclosure Statement is available on our website.

Step 1. Provide member details

Client name

Client number

Account number

Step 2. Transfer of account

Please select one of the following:

☐ **Transfer from Core to Plus account**

By signing the declaration at Step 3, you authorise the change of your Super Accelerator account from Super Accelerator Core to Super Accelerator Plus. Once the change is complete the administration costs for Super Accelerator Plus will apply to the entire account balance held within your Super Accelerator account (the change in administration costs will be effective from the first day of the month in which the transfer takes place).

☐ **Transfer from Plus to Core account** **(all assets outside the Core offering will be redeemed or sold down without further notice)**

By signing the declaration at Step 3, or by your Adviser Representative signing the declaration at Step 4, you authorise the change of your Super Accelerator account from Super Accelerator Plus to Super Accelerator Core. If your Super Accelerator Plus account comprises assets not available in Super Accelerator Core, by you or your Adviser Representative signing the declaration, you instruct us to redeem or sell all assets not available in Super Accelerator Core and invest the proceeds in the cash account until you provide us with investment instructions. Please note that the change will not occur until we have completed all necessary redemptions. Once the change is complete the administration fees for Super Accelerator Core will apply to the entire account balance held within your Super Accelerator account (the change in administration costs will be effective from the first day of the month in which the transfer takes place).

⚠ **You acknowledge that Netwealth will redeem or sell all assets not available in Super Accelerator Core if you transfer from Plus to Core.**

Please refer to the current Super Accelerator Product Disclosure Statement for details of the administration costs for Super Accelerator Core and Super Accelerator Plus and transaction costs associated with changing investments.

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Step 3. Read and sign this client declaration (where this form is completed by an Adviser Representative on the account, go to Step 4)

For a transfer from Core to Plus this form must be signed by the member[1]. For a transfer from Plus to Core this form may be signed by the member or it may be completed by an adviser who is an Adviser Representative on the account.

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 Product Disclosure Statement for the Netwealth Superannuation Master Fund current as at the date I sign this form;
2. I confirm that if I have selected to transfer my account from Plus to Core I instruct Netwealth to redeem or sell all assets in my account not available in Super Accelerator Core and invest the proceeds in cash until I provide investment instructions; and
3. I authorise Netwealth to disclose to my Nominated Financial Adviser (if applicable) information regarding this transaction and/or my investments held in the Netwealth Superannuation Master Fund.

Member

Signature

Date D D / M M / Y Y

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.

[1] This is required to authorise the increase in administration fees that will apply.

Step 4. Read and sign this adviser declaration (to be completed by an Adviser Representative providing instruction on behalf of the client)

To be completed by an Adviser Representative providing instruction on behalf of the member for a transfer from Plus to Core only.

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. As agent for the client, I instruct Netwealth to redeem or sell all assets in my client's account not available in Super Accelerator Core and invest the proceeds in cash until I, as agent for the client, provide investment instructions; and
3. I acknowledge that this transaction is governed by the terms and conditions for such transactions as set out in the relevant Product Disclosure Statement for the Netwealth Superannuation Master Fund current as at the date I sign this form.

You should give your client the current Product Disclosure Statement for the product in which this account is held.

Adviser Representative

Signature

Date D D / M M / Y Y

Step 5. Once complete 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

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