Wrap Services
Change of details

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 cannot change your correspondence and transaction method online and the offline transaction fee will not apply to these changes. All other changes allowed on this form can be performed online. The offline transaction fee will apply if you choose to make these changes offline using this form.

If you do not currently have online access to your Netwealth account you can contact your adviser to arrange the change or arrange online access for future transactions in Step 4 of 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 client details

Client name

Client number

Account number W R A P

Step 2. New contact details[1] (if applicable)

Residential address[2]

Suburb/town

State

Postcode

Country (if not Australia)

Tax details

Residential status for Australian tax purposes ☐ Resident ☐ Non-resident

[1] These contact details cannot be the contact details of your adviser.

[2] If you now reside in the European Union or the United Kingdom, we are unable to accept any future requests to transfer international securities to your account.

Step 3. Contact details for correspondence and transaction election

Contact name

Business name (if applicable)

Contact address

Suburb/town

State

Postcode

Country (if not Australia)

Phone

Home ( )

Work ( )

Mobile[3]

Email[3]

If you currently receive communications by post and provide an email address above, you will automatically receive communications electronically unless you select 'Post' as your communication method in Step 4.

[3] These contact details cannot be the contact details of your adviser. If a new mobile phone number and/or email address is provided above, this form must be signed by the client and cannot be completed by an Adviser Representative.

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Step 4. Update online access and communication method

To change your preferred online access and communication method

Level of online access (please select one) ☐ Transact ☐ Browse only

Communication method (please select one) ☐ Electronically[4] ☐ Post[5]

You elect to receive your Annual Statement and to confirm transactions by accessing your online account, unless you choose the following:

☐ I request that my Annual Statements and Confirmation Statement be sent to me by the communication method selected above.

To stop having regular statements sent to you

If you have online access and your Annual Statement and Confirmation Statements are currently sent to you, either electronically or by post, you can elect to access the information online and to stop having these statements sent to you:

☐ I elect to access my Annual Statement online and to confirm transactions in my online account and I do not want my Annual Statement or Confirmation Statements to be sent to me.

[4] Receiving communications electronically means by a SMS sent to your mobile phone number, an email sent to your email address, an attachment to an email sent to your email address, or notification to you by SMS or email that the communication is available for you to access in your secure online account or on our website. Communications include all letters, statements, confirmations and other notices.

[5] If you select to receive communications by post you must provide a mobile phone number in Step 3.

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 a new mobile phone number and/or email address is provided at Step 3, 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; 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 Service.

Account signatory one full name

Position/title ☐ Individual ☐ Director ☐ Sole director & sole company secretary

☐ Other

Signature

Date DD / MM / YY

Account signatory two (if applicable)

Position/title ☐ Individual ☐ Director ☐ Company secretary

☐ Other

Signature

Date DD / MM / YY

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.

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

If a new mobile phone number and/or email address is provided at Step 3 this form must be signed by the client and cannot be completed by an Adviser Representative.

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; and
2. 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

Signature

Date D D / M M / Y Y

Step 7. 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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