

Superannuation Inactive low-balance account Declaration



NWCLMAILBD

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

⚠ You should complete this form if you have an inactive low-balance account and want your benefit to remain with the Netwealth Superannuation Master Fund (ABN 85 090 569 109) (**the Fund**) rather than being paid to the ATO.

By completing this form, you authorise Netwealth Investments Limited (**Netwealth**), as Trustee of the Fund, to provide a written declaration on your behalf to the Commissioner of Taxation (**the Commissioner**) confirming that your inactive low-balance account is to stay with Netwealth and the ATO cannot consolidate this account on your behalf.

This form must be received 30 days prior to the relevant statement date (31 October or 30 April of the current year) to ensure Netwealth does not begin the process to pay your benefit to the ATO.

Any inactive low-balance account declaration will only be valid for a period of 16 months from the day it is received by the ATO.

You should read the current Product Disclosure Statement (**PDS**) for the superannuation product in which your account is held as there may have been changes to the terms and conditions governing this transaction. The current PDS is available on our website. The offline transaction fee will not apply

Step 1. Provide member details

Client name	<input type="text"/>
Client number	<input type="text"/> Netwealth account number <input type="text"/>

Step 2. Member inactive low-balance declaration

By signing this form I declare that I am not a member of an inactive low-balance account and authorise Netwealth Investments Limited as trustee of my superannuation fund, the Netwealth Superannuation Master Fund, to act on my behalf in giving a written notice to this effect to the Commissioner.

Member full name	<input type="text"/>
Signature	<input type="text"/>
Date	<input type="text"/> / <input type="text"/> / <input type="text"/>

It is recommended that you retain a copy of the completed form for your own records.

Step 3. Once complete please send to us

Send to us:	contact@netwealth.com.au	Netwealth Investments Limited, Reply Paid 336, South Melbourne VIC 3205
For more information:	netwealth.com.au	1800 888 223 Your adviser