Superannuation
Additional contribution

NWNEWBSWAC

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. Provide rollover contribution details (if any)

If your contribution involves a rollover from another fund, please complete the details below and attach a completed 'Rollover/transfer request' form.

Fund name

Policy/Account number

Approximate amount $

Fund name

Policy/Account number

Approximate amount $

Fund name

Policy/Account number

Approximate amount $

Fund name

Policy/Account number

Approximate amount $

Step 3. Provide other contribution details (if any)

Concessional contributions

Superannuation guarantee contributions (employer) $. 0 0

Salary sacrifice contributions (employer) $. 0 0

Personal contribution for which you intend to claim a tax deduction[1] $. 0 0

You will only be able to claim a tax deduction on contributions for which we have received a valid notice. Not submitting a notice may impact on the deductibility of contributions and the level of contributions that count toward your contribution limits. This can have significant tax consequences.

Non-concessional contributions[2]

Personal contribution $. 0 0

Spouse contribution $. 0 0

Other[3] (please attach details) $. 0 0

Total of all contributions $. 0 0

[1] A personal contribution for which a tax deduction is intended to be claimed must be accompanied by a completed 'Notice of intent to claim or vary a deduction for personal super contributions' form issued by the Australian Tax Office. If you do not submit this completed form at the same time as the contribution, we will process the contribution as a personal non-concessional contribution. Alternatively, you will have the opportunity to claim a tax deduction for that contribution at the end of the financial year when Netwealth sends you a section 290.170 notice. You may not be able to claim a deduction at that time if you have commenced a pension or transferred your benefit out of the Fund.

[2] If you have not previously quoted your tax file number ('TFN') to us we must return non-concessional contributions to you. A 'Tax File Number notification' form can be obtained from your adviser or from our website.

[3] This may include personal injury contributions or disposal of small business contributions. Please refer to the product disclosure statement (PDS) for further details of types of contributions that can be made to your account

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Step 3. Provide other contribution details (if any) (continued)

Contribution method

☐ Cheque ☐ Electronic funds transfer ☐ BPAY® ☐ Direct debit (you must also attach an original 'Direct debit request' form)

Please refer to the additional information on how to contribute in Step 8 of this form.

Step 4. Make an investment choice for the contributions

⚠ You may only select investment options available for the product in which your account is held.

Investment options	Details and minimums
Cash account	You must maintain the following minimum amounts in your cash account: • 1% of your account balance or $500, whichever is greater, up to a maximum of $5,000; plus • an amount equal to 1 months or 1 quarterly insurance premium payments (if you have the LifeWRAP facility).
Term deposits	Minimum amount of $5,000 into any one term deposit. Term deposit applications are available on our website or from your adviser.
Managed fund investments	Minimum amount of $100 into any one managed fund.
Managed Models[1]	You may only choose Managed Models if you have opened a managed account. Each Managed Model has a minimum investment. Refer to the Managed Models Menu.
Listed securities[1]	ASX listed securities and international securities can be traded through your account online or by using an 'Investment instruction' form or 'International Securities instruction' form available on our website or from your adviser.

Cash account

Amount to invest ($) ___ , ___ , ___ . 0 0 OR Percentage to invest (%) ___

Managed funds, Managed Model and other investments

Fund or Managed Model name ___

Code[2] ___ Amount to invest ($ or %) ___ , ___ . 0 0

Fund or Managed Model name ___

Code[2] ___ Amount to invest ($ or %) ___ , ___ . 0 0

Fund or Managed Model name ___

Code[2] ___ Amount to invest ($ or %) ___ , ___ . 0 0

Fund or Managed Model name ___

Code[2] ___ Amount to invest ($ or %) ___ , ___ . 0 0

Fund or Managed Model name ___

Code[2] ___ Amount to invest ($ or %) ___ , ___ . 0 0

1 You may only invest in managed models or listed securities if you have chosen Super Accelerator Plus.

2 APIR code for a managed fund or the Netwealth code shown in the Managed Models Menu for a Managed Model.

Step 4. Make an investment choice for the contributions (continued)

Fund or Managed Model name

Code[1] Amount to invest ($ or %) , . 0 0

Fund or Managed Model name

Code[1] Amount to invest ($ or %) , . 0 0

Fund or Managed Model name

Code[1] Amount to invest ($ or %) , . 0 0

Fund or Managed Model name

Code[1] Amount to invest ($ or %) , . 0 0

Fund or Managed Model name

Code[1] Amount to invest ($ or %) , . 0 0

Fund or Managed Model name

Code[1] Amount to invest ($ or %) , . 0 0

Fund or Managed Model name

Code[1] Amount to invest ($ or %) , . 0 0

[1] APIR code for a managed fund or the Netwealth code shown in the Managed Models Menu for a Managed Model.

Step 5. Nominate advice fees

Adviser name

Adviser code

Upfront member advice fee (including GST)

Please provide the details of any upfront member advice fees that you agree with Your Financial Adviser, including GST. You authorise and direct us to pay these amounts to the AFS Licensee for whom Your Financial Adviser acts as an authorised representative and you consent to some or all of this amount being paid by the AFS Licensee to Your Financial Adviser (or their nominee).

If you leave this section blank, the upfront member advice fees under the current arrangement with Your Financial Adviser will apply.

Flat percentage rate . % This will apply to the total contributions/rollovers shown on this form.

AND/OR

Fixed dollar amount $, . 0 0 This is a one-off fee.

This applies to this additional contribution/rollover only and is applied upon receipt of the contribution/rollover.

Netwealth may be entitled to receive a Reduced Input Tax Credit (RITC) on these fees and the amount deducted from your account to pay these fees may be less than the amount shown on this form.

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Step 6. Read and sign this client declaration (where this form is completed by an Adviser Representative on the account, go to Step 7)

By submitting this instruction, I represent to Netwealth that all the details in this form are true and correct and I declare that:

1. I am eligible to contribute or have contributions made on my behalf to the Fund under superannuation law; and

(The following declaration, 2, applies only if you are between the age of 65 and 75 and are making personal contributions to the Fund).

2. I have been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year.

I further declare that:

3. I confirm that any member advice fees entered at Step 5 are for financial product advice provided to me by my Financial Adviser relating solely to my Netwealth Superannuation account;
4. 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;
5. I have been given a product disclosure statement, and any supplementary product disclosure statement, for each managed fund being invested in through the Netwealth Superannuation Master Fund as selected in this transaction;
6. If I have chosen a Managed Model, I have received, read and understood, and agree to be bound by the terms and conditions set out in the Product Disclosure Statement and any Supplementary Disclosure Document for the Netwealth Managed Account and the Managed Account Managed Models Menu that includes the details of that Managed Model; and
7. I authorise Netwealth to disclose to my Financial Adviser (if applicable) information regarding this application and/or my investments held through 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.

Step 7. Read and sign this adviser declaration (To be completed by an Adviser Representative providing instruction on behalf of the client)

By submitting this instruction, I represent to Netwealth that all the details in this transaction are true and correct and I declare that:

1. The client is eligible to contribute or have contributions made on their behalf to the Fund under superannuation law; and

(The following declaration, 2, applies only if the client is between the age of 65 and 75 and is making personal contributions to the Fund).

2. The client has been gainfully employed for at least 40 hours in a period of not more than 30 consecutive days in the current financial year.

I further declare that:

3. The member advice fees entered at Step 5 are for financial product advice I have provided to my client relating solely to their Netwealth Superannuation account;
4. I am the nominated Adviser Representative for this client, that my appointment has not been revoked and the client has authorised me to submit this instruction as the client's agent;
5. I have given the client a product disclosure statement, and any supplementary product disclosure statement, for each managed fund being invested in through the Netwealth Superannuation Master Fund as selected in this transaction;
6. 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; and
7. If this form includes a Managed Model, I acknowledge that this transaction is governed by the terms and conditions for such transactions as set out in the Product Disclosure Statement for the Netwealth Managed Account and I have given the client a copy of the Managed Account Managed Models Menu that includes the details of that Managed Model.

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

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Step 8. How to contribute

Method	Payment		Other requirements	
Cheque	Cheques should be made payable to: Netwealth Investments Limited – Applications Account. Cheques should be crossed "not negotiable".		Attach details of the type of contribution to cheque OR Attach an 'Additional contribution' form to your cheque	
Electronic funds transfer – for banking online	Bank: BSB number: Account no.: Reference:	ANZ 013 993 Last 9 digits of your Netwealth account number A – Superannuation guarantee B – Salary sacrifice C – Personal contribution D – Spouse contribution	Example: to make a salary sacrifice contribution for Netwealth account number 0001040500 enter details as follows: BSB number: Account no.: Reference: Note: Superannuation guarantee will be the default contribution type if no reference is provided.	 013 993 001040500 B
Electronic funds transfer – for branch deposits	Bank: BSB number: Account no.: Account name: Reference:	ANZ 013 030 837 557 601 Netwealth applications account Your 10 digit Netwealth account number	Example: to make a contribution at a bank branch for Netwealth account number 0001040500 enter details as follows: Bank: BSB number: Account no.: Account name: Reference:	 ANZ 013 030 837 557 601 Netwealth applications account 0001040500
BPAY®	Biller Codes:	156513: Superannuation guarantee 156539: Salary sacrifice 156505: Personal contribution 156521: Spouse	Each client has a unique BPAY® Customer Reference Number (CRN). This can be found on the Netwealth website, on periodic statements or by contacting Netwealth.	
Direct debit	One-off direct debits or a regular contribution plan.		'Direct debit request' – to request a one-off or ad-hoc direct debit from your bank account; AND/OR 'Regular contribution plan' form – to commence a regular contribution plan.	
SuperStream Employers Only	Bank: BSB number: Account no.: Reference:	ANZ 013 030 837 557 724 Same as SuperStream contribution message	Example: to make a SuperStream contribution for Netwealth account number 0001040500 send the SuperStream contribution message to: ABN: USI: Member ID:	 94 573 747 704 NET0017AU 0001040500

All contribution remittances except SuperStream must be sent to remittance@netwealth.com.au

In all cases, where a change in upfront member advice fee is required, you must either remit an 'Additional contribution' form with your contribution, or advise us of changes to this fee prior to contributing.

It is important to follow these contribution instructions carefully, otherwise we may not be able to correctly allocate your contribution to your account.

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Rollovers to the Netwealth Superannuation Master Fund

You can request a rollover from another fund through your online account, or by completing a 'Rollover/transfer request' form and returning it to us with the required further information as detailed in that form.

Step 9. 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

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