# Superannuation Change of details



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

You cannot change your name or 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 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. Update personal details (if applicable)											
Mr/Mrs/Miss/Ms/Dr/Other	Family name <sup>1</sup>										
Given name(s)											
Date of birth	DD/MM/YY Sex Male Female										
<sup>1</sup> Please attach certified documentary evidence if your name	ne has changed (such as marriage certificate or deed poll).										
Step 3. New contact details (if applicable)											
Residential address											
Suburb/town											
State	Postcode Country (if not Australia)										
Postal address (if different from above)											
Suburb/town											
State	Postcode Country (if not Australia)										
Phone	Home (										
Mobile											
Email											

## Step 4. Update online access and communication election

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 <sup>1</sup>	Post						
AND								
Please reissue my login details.								

<sup>1</sup> Receiving communications electronically means by an email sent to your email address, an attachment to an email sent to your email address, or notification to you by email that the communication is available for you to access in your secure online account or on the public website. Communications include all letters, statements, confirmations and other notices.

Step 4. Update online access and communication election (continued)
You elect to receive your Annual Member Statement and to confirm transactions by accessing your online account, unless you choose the following:
I request that my Annual Statements and monthly 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 Member Statement and monthly 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 Member Statement online and to confirm transactions in my online account and I do not want my Annual Member Statement or monthly Confirmation Statements to be sent to me.
Step 5. Provide new Income Stream payment details (if applicable)
Amount of pension now required (please tick one box below and nominate amounts as appropriate)
Standard Income Stream
Annual amount of pension required <sup>1</sup>
The minimum annual income stream amount
OR \$ p.a. (must be greater than the minimum amount)
Transition to Retirement Income Stream
Annual amount of pension required (please tick one box)
The maximum annual pension <sup>2</sup>
OR The minimum annual pension <sup>3</sup>
OR \$
Term Allocated Pension
Term selected years
Annual amount of pension required (please tick one box)
Fixed calculated amount
OR 90% of the fixed calculated amount
OR 110% of the fixed calculated amount
OR Nominated annual amount in allowable 90-110% range \$
Frequency of payments
Payment frequency (please tick one box) Monthly Quarterly Half yearly Yearly
Next payment date M M / Y Y (payments are made on or about the 15 <sup>th</sup> of each month)

- <sup>1</sup> If there is less than a full year from the start of your income stream to the next 30 June, you will receive the annual amount reduced on a pro rata basis.
- <sup>2</sup> If there is less than a full year from the start of your income stream to the next 30 June, you will receive the full maximum amount over the remainder of the year.
- <sup>3</sup> If there is less than a full year from the start of your income stream to the next 30 June, you will receive the annual amount reduced on a pro rata basis.

### Step 6. Add, change or remove a reversionary pensioner nomination (if applicable)

Please provide reversionary pensioner details if you wish to add or change a reversionary pensioner. A reversionary pensioner must be a superannuation dependant and a tax dependant. A Power of Attorney is unable to nominate themselves as a reversionary.

Full name	
Address	
Suburb/town	
State	Postcode Country (if not Australia)
Date of birth	
Relationship	Spouse/de facto Child Interdependent Financial dependent

If you wish to remove a reversionary pensioner, please tick this box.

## Step 7. Read and sign this client declaration (where this form is completed by an Adviser Representative on the account, go to Step 8)

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; and
- 2. I authorise Netwealth to disclose to my Financial Adviser (if applicable) information regarding this transaction and/or my investments held through the Netwealth Superannuation Master Fund.

Member full name																			
Signature										Da	ate	D	D	/	M	M	/	Ŷ	Y

A If you are changing your name, please sign both your existing and your current signature.

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

### Step 8. 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. 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 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 DD / MM / YY
Step 9. Once complete please send to us			
Send to us:  (a) contact	onetwealth.com.au	Netwealth Investments Limited, Re	ply Paid 336, South Melbourne VIC 3205
For more information: netweak	h.com.au	1800 888 223	<b>经</b> Your adviser