

Your Netwealth rate card and details of your fee arrangement. To view online, [click here](#).



Important updates

New Netwealth Accelerator disclosure documents



We are writing to tell you that on 1 March 2020 new disclosure documents will be issued for Super and Wealth Accelerator accounts.

As indicated in last week's email, the major changes are:

1. Administration fees will be changed for new clients from 1 March 2020 and for existing clients from 1 January 2021
2. International fees have changed
3. There are new investment options for wholesale clients (Wealth Accelerator only)
4. Payments can be made online using BPAY (Wealth Accelerator only).

Information will be sent to clients

On Wednesday 4th March your clients will be notified of the changes. They will receive a covering letter, and information about how to get a detailed notice of the change. Click below to view these:

- [For Super Accelerator accounts](#)
- [For Wealth Accelerator](#)
- [For Super Wrap](#)
- [For Investment Wrap](#)

Rate card: Super and Wealth Accelerator Plus discounted account fees

From 1 March 2020 the following discounted rate card will apply for clients of Financial Services Partners Pty Ltd using Netwealth Accelerator Plus.

Your Rate Card

An account fee applies based on a percentage of your account balance, plus a fixed amount. The account fee is subject to a minimum daily amount:

[Super Accelerator Plus](#)

[Wealth Accelerator Plus](#)

Account balance	% applicable	Account balance	% applicable
\$0 - \$250k	0.375% p.a.	\$0 - \$250k	0.375% p.a.
\$250k - \$500k	0.250% p.a.	\$250k - \$500k	0.250% p.a.
\$500k - \$1.0m	0.175% p.a.	\$500k - \$1.0m	0.175% p.a.
\$1.0m - \$2.5m	0.025% p.a.	\$1.0m - \$2.5m	0.025% p.a.
Above \$2.5m	Nil	Above \$2.5m	Nil

The **minimum account fee** is calculated daily, at the rate of \$475 per calendar year and applies to each Netwealth Accelerator Plus account.

A **fixed amount** of \$240 p.a. per account in the disclosure documents [does not apply](#).

Family groups can have a maximum of six linked accounts across Wealth Accelerator and Super Accelerator Plus. Only accounts that are established under the above fee scale may be linked in a family group.

All other fees and all terms and conditions will apply as described in the relevant Disclosure Documents, which will be available on our website or on request from Netwealth from 1 March 2020.

What you need to do

For new clients

You can submit an application online or the application that accompanies the disclosure documents dated 1 March 2020. There is no longer any supplementary application form required.

From 1 March 2020 the old disclosure documents for Super Accelerator and Wealth Accelerator dated 1 July 2019 will be withdrawn and must not be given to clients. This includes any supplementary disclosure documents.

For existing clients

Your current clients will be automatically transitioned to your Rate Card fees on 1 January 2021.

If you wish to transition a client to this new fee structure before 1 January 2021 you can use our [Online fee transition tool](#) or your clients can complete a [Change of account fees form](#).

Whilst most clients will be better off, we recognise that not all clients may benefit from this new fee structure. To determine the impact of the new fees for individual clients you can [download our fee calculator](#).

Accessing the disclosure documents

The updated disclosure documents, application forms and incorporated documents can be accessed from our website from 1 March 2020 or by contacting us on 1800 888 223.

Need more information?

For more information regarding these changes please [contact your Business Development or Training and Relationships Manager](#), call Investor Services on 1800 888 223 or email contact@netwealth.com.au.



Kind Regards,
Nandi Affleck
Distribution Manager

About Nandi:

Nandi is responsible for the distribution of Netwealth's platform, managed account and investment capabilities to advisers and private wealth practices in Victoria and Tasmania.

For more information



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