ClearView **WealthFoundations**

Family Groups form

Purpose of this form

Use this form to link WealthFoundations members to a Family Group for the purpose of calculating a fee rebate. Members may be eligible for a fee rebate if the combined balances of all the WealthFoundations accounts in their Family Group are over $250,000 and their account is active on the day the fee rebate is processed. For more information, please refer to the WealthFoundations Super and Pension Product Disclosure Statement at **clearview.com.au/pds**

A. Family Group details

Complete the table below to link members to either

☐ An existing Family Group name or number

☐ A new Family Group name

WealthFoundations member name[1]	Date of birth	WealthFoundations account number[2]	Is this account super or pension?	Relationship (spouse/de facto, child, parent or sibling)	Member signature*
Example: Mr A Citizen	17/02/1971	CSUP/100000	Super	Spouse	

* By signing above, each member consents to join this Family Group and share certain personal information with other members of the Family Group for the purposes of administration and communication of the fee rebate. Members can leave the Family Group at any time.

1. Each member must have an active WealthFoundations account to join a Family Group. A minimum of two and a maximum of six family members can join a Family Group. Family Group members cannot have different financial advisers.
2. Each family member can have up to ten WealthFoundations accounts.

B. Financial adviser declarations and signature

Adviser name

Adviser code

Dealer group

By signing the below, I confirm all members listed on page 1 of this form meet the Family Group eligibility requirements as per the WealthFoundations Product Disclosure Statement (**PDS**) and have provided consent to join the Family Group.

Signature of financial adviser

X

Date signed

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We are committed to handling the personal information and sensitive information in a secure manner and in accordance with the Privacy Laws. For a copy of our Information Handling Policy, please visit **clearview.com.au**.

Sending your form

Please send the form to us via your email address on file or mail.

Mailing address
ClearView WealthFoundations
Reply Paid 4232
Sydney NSW 2001

Email address
client.wealth@clearview.com.au

If you have any questions or need help please call our Service Centre on **132 977**.

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