

New client login and accepting your portfolio

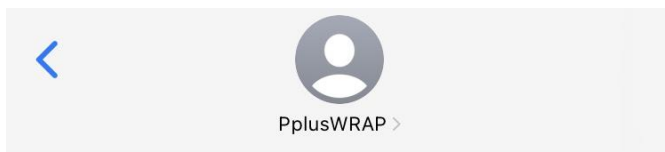
Investor guide only.

This guide provides instructions on how investors can gain access to their client portal for the first time and accept any open applications.

New Client Login

Once your adviser has submitted your application, you will receive a text message and two (2) emails from PlatformplusWRAP

Text Message:



Text Message
Today 8:52 am

Welcome to PlatformplusWRAP. We've emailed a temporary password link to R...l@infocus.com.au which is valid for the next 24 hours. Please log in to activate your account. Questions? Speak to your adviser Ismael PFAAAA0000001 on [07 00112233](tel:0700112233). Thanks, The PlatformplusWRAP Team.



Password Notification Email:

From: noreply@platformpluswrap.com.au
Sent: 1/01/2023
To: Joey.West@test.com.au
Subject: Password Notification Email

Set up your new password

Hi Joey,

Welcome to PlatformplusWRAP.

Please use the below link to set up your new PlatformplusWRAP password.

[Create a password](#)

Please note this link expires in 72 hours.

If the link has expired you'll be taken to the login page. From here just click the 'Forgotten your Password' link and follow the prompts to set up a password.

If you have any questions, talk to your Nominated Financial Adviser Infocus Advisory on +61 07 00112233, or contact us on 1300 168 905. Lines are open 8.30 a.m. - 7 p.m. AEST from Monday to Friday (excluding national public holidays). You can also email us at clientsupport@platformpluswrap.com.au

PlatformplusWRAP

Level 2, Cnr Maroochydore Road & Evans Street, **Maroochydore** | QLD 4558
 PO Box 1856, **Sunshine Plaza** | QLD 4558

<http://www.platformpluswrap.com.au/>

Username Notification Email:

From: noreply@platformpluswrap.com.au
Sent: 1/01/2023
To: Joey.West@test.com.au
Subject: Username Notification Email

Log in to your new account today

Name: Joey West
User ID: JWest825

Hi Joey,

Welcome to PlatformplusWRAP.

We're pleased to confirm your new account is almost ready to go. You can activate it by logging into PlatformplusWRAP at <https://login.platformpluswrap.com.au> with your User ID:

User ID: JWest825

Your User ID won't change and you'll need it every time you log in, so be sure to keep a note of it and keep it safe. Your temporary password link will be sent to you in a separate email shortly.

Log in to PlatformplusWRAP to activate your new account.

Once you've logged in, simply review your account information and download the important documents provided. Keep your mobile phone handy as you'll receive a one-time PIN to secure your new account.

You'll receive an email from us once your account is active and ready to use.

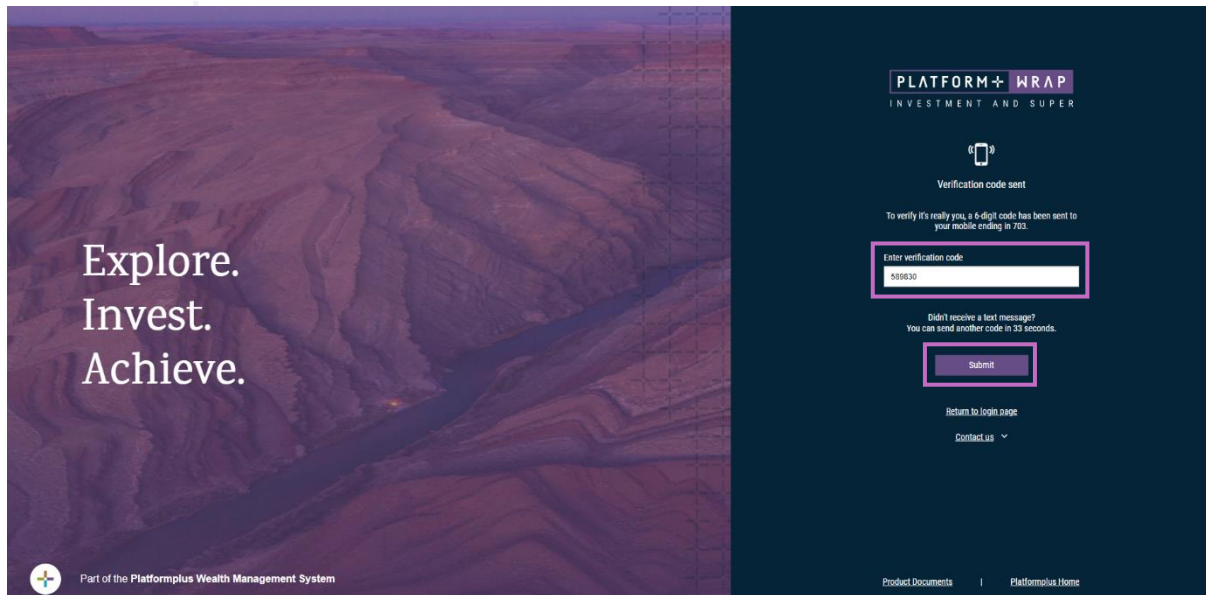
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PlatformplusWRAP

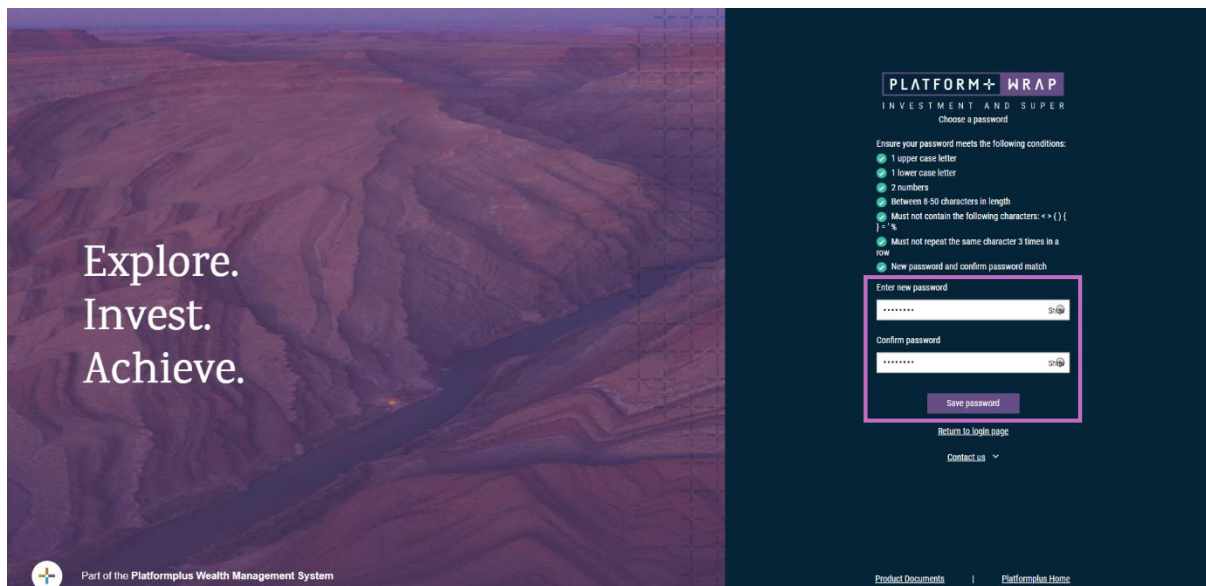
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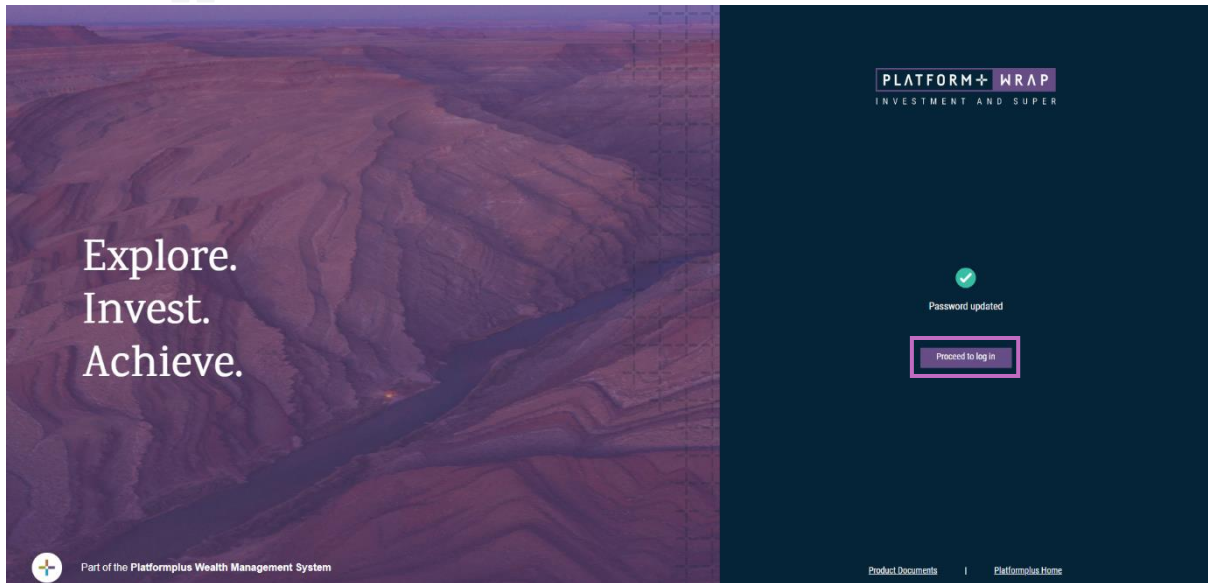
1. Click the [Create a Password](#) link in the **Password Notification Email**
2. A **verification code** will be sent to your nominated mobile number
3. Enter the pin and click [Submit](#)



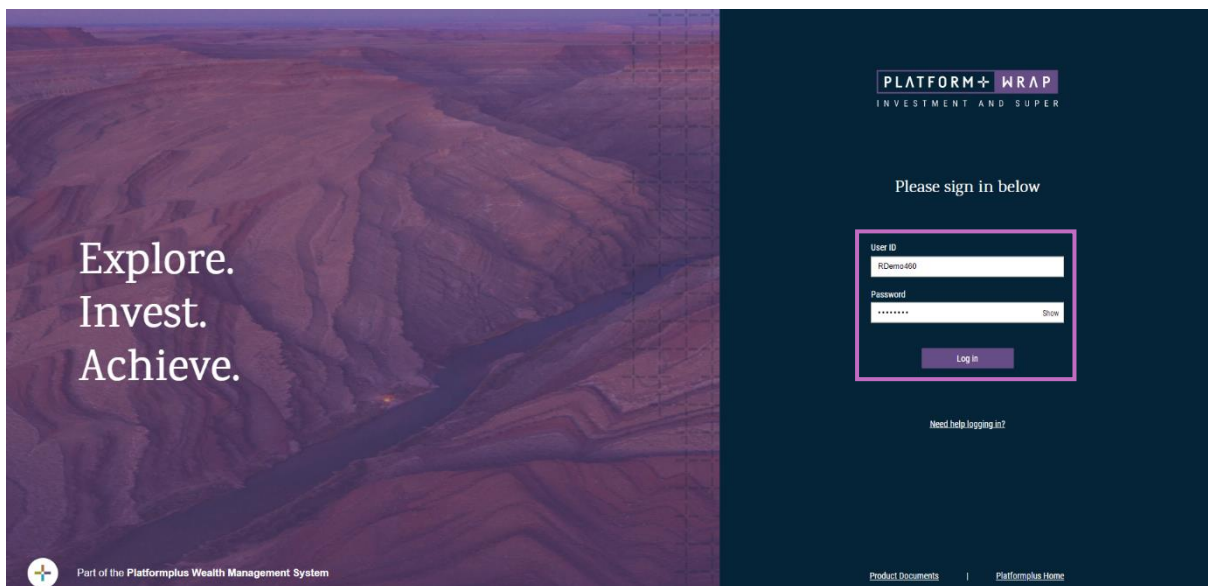
4. Create your password ensuring it meets the required conditions
5. Click [Save Password](#)



- You will then be redirected to the following screen. Click [Proceed to log in](#)

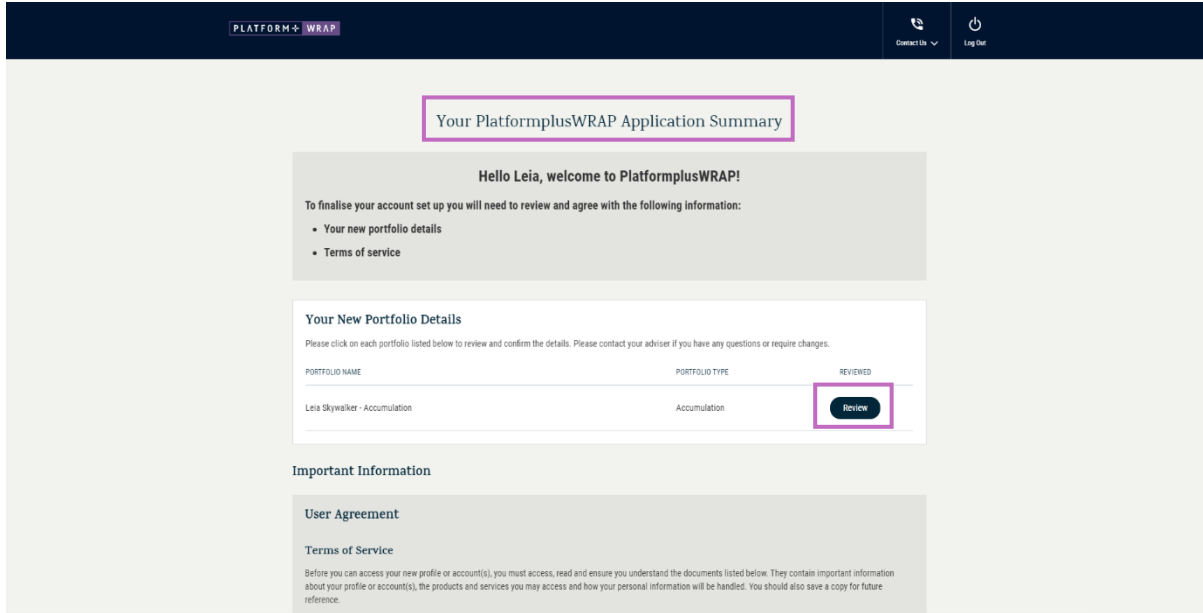


- Enter the User ID noted in the **Username Notification Email** and the password you created
- Click [Log in](#)

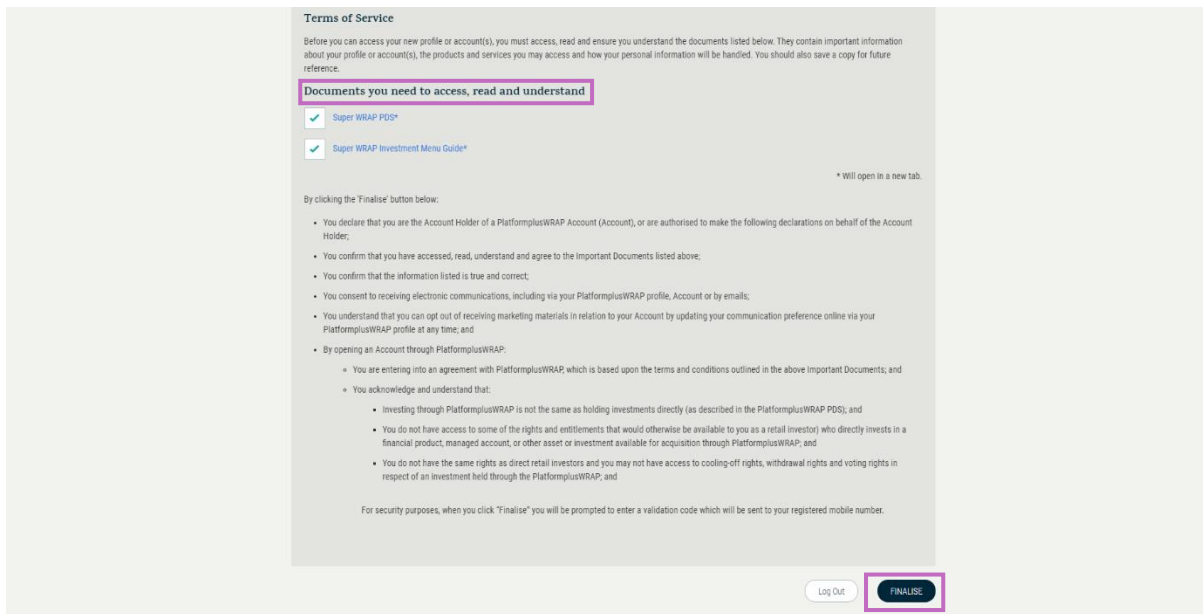


Accepting Your Portfolio

1. The first time you log into the portal you will see your [PlatformplusWRAP Application Summary](#)
2. Click the [Review](#) button to review the application information and if proceeding, click [Approve](#)



3. You will be redirected back to the [PlatformplusWRAP Application Summary](#)
4. Open and tick each of the Important Documents. **Note: a new tab will open with each one**
5. Once all boxes have been ticked, click the [Finalise](#) button



Should you have any questions or require any additional information in relation to this guide, please contact your Financial Adviser or the PlatformplusWRAP Client Support Centre on 1300 168 905 or clientsupport@platformpluswrap.com.au.