New client login and accepting your portfolio

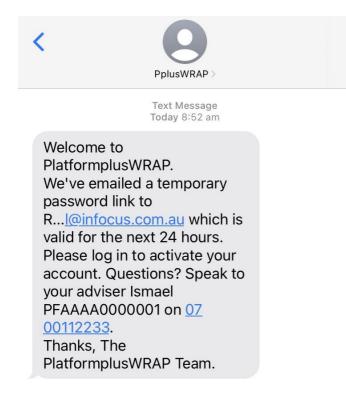
Investor guide only.

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

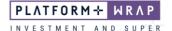
Once your adviser has submitted your application, you will receive a text message and two (2) emails from PlatformplusWRAP

Text Message:





(Text Message



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.

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

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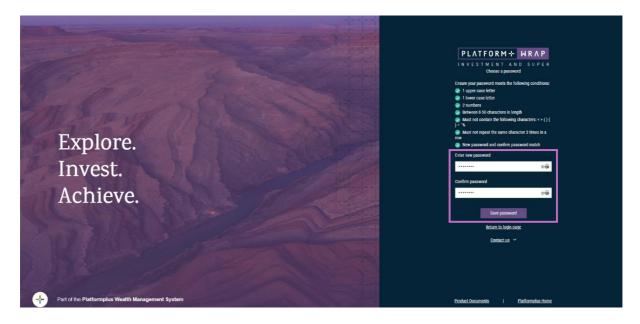
http://www.platformpluswrap.com.au/



- 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



6. You will then be redirected to the following screen. Click Proceed to log in



- 7. Enter the User ID noted in the **Username Notification Email** and the password you created
- 8. Click <u>Log in</u>

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Explore. Invest. Achieve.	Please sign in below
Part of the Pistformplus Wealth Management System	Need help logging in? Product Documents 1 Platformakas Home

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

PLATFORM+	PLATFORN+ WEAP			- Long Cart
	Your PlatformplusWRAP A	pplication Summary		
	Hello Leia, welcome to P o finalise your account set up you will need to review and agree with th • Your new portfolio details • Terms of service			
,	Your New Portfolio Details Heave click on each portfolio listed below to review and confirm the details. Please contact y ONTFOLIO MAKE	rour adviser if you have any questions or require change: PORTFOLIO TYPE	rs. Reviewed	
	ela Skywaliker - Accumulation	Accumulation	Review	
Im	portant Information			
	User Agreement Terms of Service efore you can access your new profile or account(s), you must access, read and ensure you body you profile or account(s), the products and services you may access and how your per demone.			

- 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

Terms of Service
Before you can access your new profile or account(s), you must access, read and ensure you understand the documents listed below. They contain important information about your profile or account(s), the products and services you may access and how your personal information will be handled. You should also save a copy for future reference.
Documents you need to access, read and understand
Super WRAP POS*
Super WRAP Investment Menu Guide*
* Will open in a new tab.
By clicking the 'Finalise' button below:
 You declare that you are the Account Holder of a Platformplus/WRAP Account (Account), or are authorised to make the following declarations on behalf of the Account Holder;
 You confirm that you have accessed, read, understand and agree to the important Documents listed above;
You confirm that the information listed is true and correct;
You consent to receiving electronic communications, including via your PlatformplusWRAP profile, Account or by emails;
 You understand that you can opt out of receiving marketing materials in relation to your Account by updating your communication preference online via your PlatformplusWRAP profile at any time; and
By opening an Account through PlatformplusWRAP:
You are entering into an agreement with PlatformplusWRAP, which is based upon the terms and conditions outlined in the above important Documents; and
You acknowledge and understand that:
 Investing through PlatformplusWRAP is not the same as holding investments directly (as described in the PlatformplusWRAP PDS); and
 You do not have access to some of the rights and entitlements that would otherwise be available to you as a retail investory who directly invests in a financial product, managed account, or other asset or investment available for acquisition through PlatformplusWRAP, and
 You do not have the same rights as direct retail investors and you may not have access to cooling off rights, withdrawal rights and voting rights in respect of an investment held through the PlatformploxWRAP; and
For security purposes, when you click 'Finalise' you will be prompted to enter a validation code which will be sent to your registered mobile number.

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.