Client acceptance of a Direct Debit Request

Investor guide only.

This guide provides instructions on how investors can authorise Direct Debits created by the adviser.

- 1. Click on Administration
- 2. Click on Authorisations

PLATFORM+ WRAP					My Portfolios	My Notifications	My Details	U Log Out
♠ Summary Accounts Inv	estments Cash &	Payments Orders	Administration Do	ocuments				
∓ Filter Accounts: Elise Demo		Elise Demo - Individual Portfolio My Portfolio Administration As at 15 February 2023			Quick Links			
Authorisations 2	Fees and	Charges	Corporate Actions		Transfers		Тах	
From 01/12/2022 🛅 T	0 15/02/2023	Since Inception	M 1Y	Show :	Open authorisations	Comple	te authorisations	5
EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS				
🕀 Regular Deposit	15/02/2023	PP1000375-282	Elise Demo			Au	thorise R	leject
(+) One-off Deposit	15/02/2023	PP1000375-282	Elise Demo			Au	thorise R	leject

Here you will see any one off or regular Direct Debit deposits created by your adviser.

- 3. To view the detail, click on the circle with the cross in it
- 4. Once you have reviewed the information, click either Authorise or Reject

Filter Accounts:	Ν	Quick Links		
Elise Dellio		As at 15 February 2023	3	
Authorisations 2	Fees and Charges	Corporate Actions	Transfers	Тах
From 01/12/2022 🗂	To 15/02/2023 📇 Si	nce Inception 3M TY	Show : Open auth 	orisations Ocmplete authorisations
EVENT	DATE STARTED ACCOUN	T NUMBER ACCOUNT NAME	PROGRESS	
Regular Deposit	15/02/2023 PP1000	375-282 Elise Demo		Authorise Reject
Payment Details				
Amount	\$1,000.00	Until	Until Cancelled	
Currency	AUD	Method	Direct Debit	
Frequency	Monthly	Bank Account Number	CBA ***-***-1004	
Start Date	15 Feb 2023			
Order Details				
Investment Name	AUD Cash			
Value	\$1,000.00			
Order Type	Buy			
Investment Code	ALIDCASH			

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LATFORMPLUSWRAP – USE	R GUIDE – CLIENT ACCEPTANCE OF A	DIRECT DEBIT REQUEST	INVESTMENT AND SUPE
One-off Deposit	15/02/2023 PP1000375-282	Elise Demo	Authorise Reject
Payment Detai	ls		
Amount	\$100,000.00		
Currency	AUD		
Bank Account Number	CBA ***-****1004		
Order Details			
Investment Name	AUD Cash		
Value	\$100,000.00		
Order type	Buy		
	AUDOACH		

5. Once you have authorised the direct debit you can view the detail by clicking <u>Complete</u> <u>authorisations</u>

Elise Demo		Quick Links				
Authorisations 2	Fees and C	harges	Corporate Actions	Transfers	Tax	
Your authorisation was s	uccessful.					
From 01/12/2022 😁	To 15/02/2023 😁	Since Inception 3M	1	Show : Open authorisations	Complete authorisations	
EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS		
) Regular Deposit	15/02/2023	PP1000375-282	Elise Demo		Authorised 15/02/2023	



Note: *Any one-off direct debit will be drawn from your account the day you accept it (unless after 6pm).*

Should you have any questions or require any additional information in relation to this guide, please contact the PlatformplusWRAP Support Team on 1300 191 952 or support@platformplus.com.au