

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](#)

Elise Demo - Individual Portfolio

My Portfolio Administration

As at 15 February 2023

Filter Accounts: Elise Demo

Summary Accounts Investments Cash & Payments Orders **Administration** Documents

Authorisations ² Fees and Charges Corporate Actions Transfers Tax

From: 01/12/2022 To: 15/02/2023 Since Inception 3M 1Y Show: Open authorisations Complete authorisations

EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS	
Regular Deposit	15/02/2023	PP1000375-282	Elise Demo	<div style="width: 100%;"></div>	<button>Authorise</button> <button>Reject</button>
One-off Deposit	15/02/2023	PP1000375-282	Elise Demo	<div style="width: 100%;"></div>	<button>Authorise</button> <button>Reject</button>

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: Elise Demo

My Portfolio Administration

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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	AUDCASH

- Once you have authorised the direct debit you can view the detail by clicking **Complete authorisations**



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