

# Cancelling an Ongoing Adviser Fee

**Adviser guide only.**

This guide provides instructions on how to cancel an ongoing adviser fee.

1. Once in the client portfolio, click on **Fees & Interest** in the main menu
2. Click **Agreed Remuneration**

**Fees & Interest**

Jason Super - Accumulation  
PP6000500 - MEMBER

Quick Links: Holdings, Contribute, Create Orders, Go to the Client Portal

Adviser Fees | Client Fees | **Agreed Remuneration** | Schedules

Select Account: All | Currency: | From: 20-Jan-2023 | To: 20-Apr-2023

No Transactions Found

3. Click **End Fee Arrangement**

**Fees & Interest**

Jason Super - Accumulation  
PP6000500 - MEMBER

Quick Links: Holdings, Contribute, Create Orders, Go to the Client Portal

Adviser Fees | Client Fees | **Agreed Remuneration** | Schedules

**One Off Adviser Fee**

ACCOUNT ID	DATE CREATED	GST INCL	GST EXCL	CHARGE STATUS	ACTION
					One Off Fee

**Fee Arrangements**

TYPE	STATUS	ANNIVERSARY DAY	NEXT ANNIVERSARY DATE	RENEWAL PERIOD END DATE	CONSENT EXPIRY DATE	ACTION
Ongoing	Active	20 April	20th April 2024	17th August 2024	16th September 2024	View

**Active Fee Arrangements**

Superannuation Account - Accumulation

Is this account funded with borrowed funds?  Yes  No | Estimated Account Balance: \$ 350,000.00

Adviser Service Fee

CHARGE TYPE	ANNUAL RATE	CHARGE FREQUENCY	ESTIMATED FEE PER FREQUENCY (INCL GST)
% \$ No Charge	PlatformplusWRAP Admin Tier	Monthly	\$320.83
		GST INCL	GST EXCL
	\$0.00 - \$1,000,000.00	1.1000 %	1.0000 %
	Above \$1,000,000.01	0.8000 %	0.7273 %

Edit Fee Arrangement | **End Fee Arrangement**

4. A pop-up box will appear confirming that you want to cancel the fee arrangement. Click **OK**.

The screenshot shows the 'Jason Super - Accumulation' account page. A modal dialog box is displayed with the text 'Are you sure you want to cancel this fee arrangement?' and two buttons: 'OK' (highlighted with a red box) and 'Cancel'. The background interface includes a sidebar with navigation options like Home, Clients, Portfolios, and Investments. The main content area shows sections for 'One Off Adviser Fee', 'Fee Arrangements', and 'Active Fee Arrangements'.

5. Once successfully cancelled, the following message will appear:

The screenshot shows the same account page after the cancellation. A green message box at the top left of the main content area states 'Changes have been successfully submitted.' The 'Fee Arrangements' table now shows the status as 'Pending Client Consent'. The 'Active Fee Arrangements' section shows a balance of \$350,000.00.

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](mailto:support@platformplus.com.au).