Creating a one-off Direct Debit in an Accumulation Account

Adviser guide only.

This guide provides instructions on how to create a one-off direct debit in an accumulation account.

- 1. Once in the client portfolio, click on Cash & Payments in the main menu
- 2. Click Deposit

PL/	ATFORM⊹ WRAP ×	Cash & Payments	Q Portfolio Search Full + Ф. Search Search Create New 142 Notifications Log Out
•	Home	Jason Super - Accumulation 🔥	Quick Links Holdings Contribute Create Orders Go to the Client Portal
Ť	Chents	Summary	Statement Deposit
	Portfolios Investments Cash & Payments Orders Investment Programs &		UNCLEARED DEPOSITS AVAUABLE CASH MINIMUM CASH UNGETTILED CASH ACCRUED INTEREST
	Add Account Transfers	Total 0.00% AUD \$0.00	
	Corporate Actions Superannuation Tax Fees & Interest		
	Portfolio Settings Notifications Reports & Documents		

3. Scroll down and click the **Deposit** button in the **Voluntary Contributions** box

ansfers				
rporate Actions		Deposit Method		
perannuation		Direct Credit		
		Payment Currency	AUD	
s & Interest		Bank		
folio Settings		Account Name	WTM Fumgakiejm (Uumgwefie) Pty Limited	
fications		BSB	248-026	
rts & Documents		Account Number	100008150	
stment Programs		Contribution Type Personal Spouse		
earch		Your Reference Number	1006630012	
erature Library		Please ensure you quote this reference number when pay Transfer).	ing into your account using Direct credit (Electronic Funds	
ministration		For payments using Direct credit, please allow up to 5 bus account.	siness days for the funds to be received and allocated to your	
	Voluntary Contributions			
	ACCOUNT	AVAILABLE TO INVEST	PENDING DEPOSITS	OPTIONS
	Superannuation Account	\$0.00	\$0.00	Deposit
	Regular Voluntary Contributio	ons		Create New Regular Voluntary Contribution 🗸
			-	

PLATFORM + WRAP

4. Enter the payment amount and select bank account. Click Next step

WRAP Contribute Into: Sup	erannuation Account - PP6000	500-242	
Payment Options			Contribute
Payment Currency	Payment Method	Payment Amount	1. Deposit Options
AUD - Australian Dollar	Direct Debit	\$ 100,000.00	2. Choose Investments
Bank Account 484-799 10011002 - Jason Super	~		3. Summary
			Exit Without Saving
			Save and Resume Later
			Next step

NOTE: If you are utilising the invest excess cash option, you do not need to complete the **Choose Investments** box. The funds will automatically be invested as per the invest excess cash option.

If you are not utilising the invest excess cash option, or would like this deposit to be invested in an alternative way:

1. Click Select Investments

'LATFORM⊹ WRAP	Contribute Into: Superannuation Accour	nt - PP6000500-242			
Cho	pose Investments			Contribute	
Se	elect Investments Anything not invested will be added as cash.			1. Deposit Options	\odot
				2. Choose Investments	
Sele	ected Investments			3. Summary	
INVEST	TMENT		PAYMENT	Exit Without Saving	
				Save and Resume Later	
				Next step	

2. Search for the required investments

	2. Choose investme		
	3. Summary		
Find Investments			×
Equities	Managed Funds	Model Portfolio	
Q, M_14313			
Model Name			
Alpha Growth SMA			
			Search

PLATFORMPLUSWRAP - USER GUIDE - CREATING A ONE-OFF DIRECT DEBIT IN AN ACCUMULATION ACCOUNT



3. Click on Select

nd Investments					×
Eq	uities	Manage	d Funds	Model Portfolio	
Q M_14313					
Model Name					
Alpha Growth SMA					
					Search
Results					
TYPE	CODE ^	NAME	MODEL BASE CURRENCY		
Model Portfolio	M_14313	Alpha Growth SMA	AUD		Select
		< 1	~ >		

4. Close the Find Investments window

Find Investment	s				×
	Equities	Manage	ed Funds	Model Portfolio	
Q M_14313					
Model Name					
Alpha Growth SMA					
					Search
Results					
ТҮРЕ	CODE ^	NAME	MODEL BASE CURRENCY		
Model Portfolio	M_14313	Alpha Growth SMA	AUD		Select
		< 1	~ >		

PLATFORM + WRAP

5. Enter the amount you wish to be invested from the voluntary contribution

ATFORM+ WRAP Contribute Into: Supe	rannuation Account - PP6000500-242			
Choose Investments			Contribute	
Select Investments Anything not in	wested will be added as cash.		1. Deposit Options 2. Choose Investments	 O
Selected Investments			3. Summary	0
INVESTMENT		PAYMENT	Exit Without Saving	
Alpha Growth SMA		\$ 100,000.00	Save and Resume Later Next step	

6. Review the details and click **<u>Submit</u>**

ΡL

Contribute into, supera	inuation Account - 226000500-242		
Please Review These Details B	Please Review These Details Before Submitting		
Currency	AUD	1. Deposit Options	\bigcirc
Payment Type	single	2. Choose Investment	s 🕑
Payment Method	Direct Debit	3. Summary	
Bank Account	484-799 10011002 - Jason Super		
Amount	\$100,000.00	Exit With	out Saving
Selected Investments	INVESTMENT	AMOUNT Save and R	esume Later
	Alpha Growth SMA	\$100,000.00	
		Submit	

7. You will see a message confirming the payment has been successfully submitted and is pending authorisation

Doumont has been suspensifully submit	tod and is panding authorization		Contribute	
Payment has been successfully submit	eo and is pending authorisation.		1 Deposit Ontions	
Please Review These Detail	s Before Submitting		2. Choose Investments	6
Currency	AUD		3. Summary	(
Payment Type	single			
Payment Method	Direct Debit		Exit	
Bank Account	484-799 10011002 - Jason Super			
Amount	\$100,000.00			
Selected Investments	INVESTMENT	AMOUNT		
	Alpha Growth SMA	\$100.000.00		

NOTE: The client will need to log in to their client portal and accept the payment. Please refer to the client guide on accepting a direct debit

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.