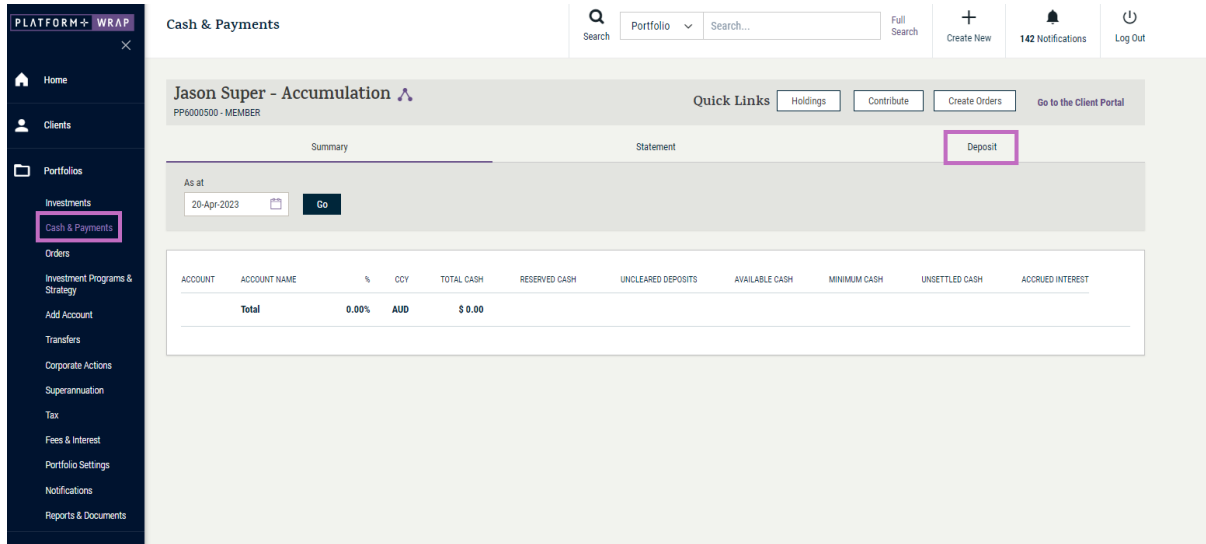


Creating a one-off Direct Debit in an Accumulation Account

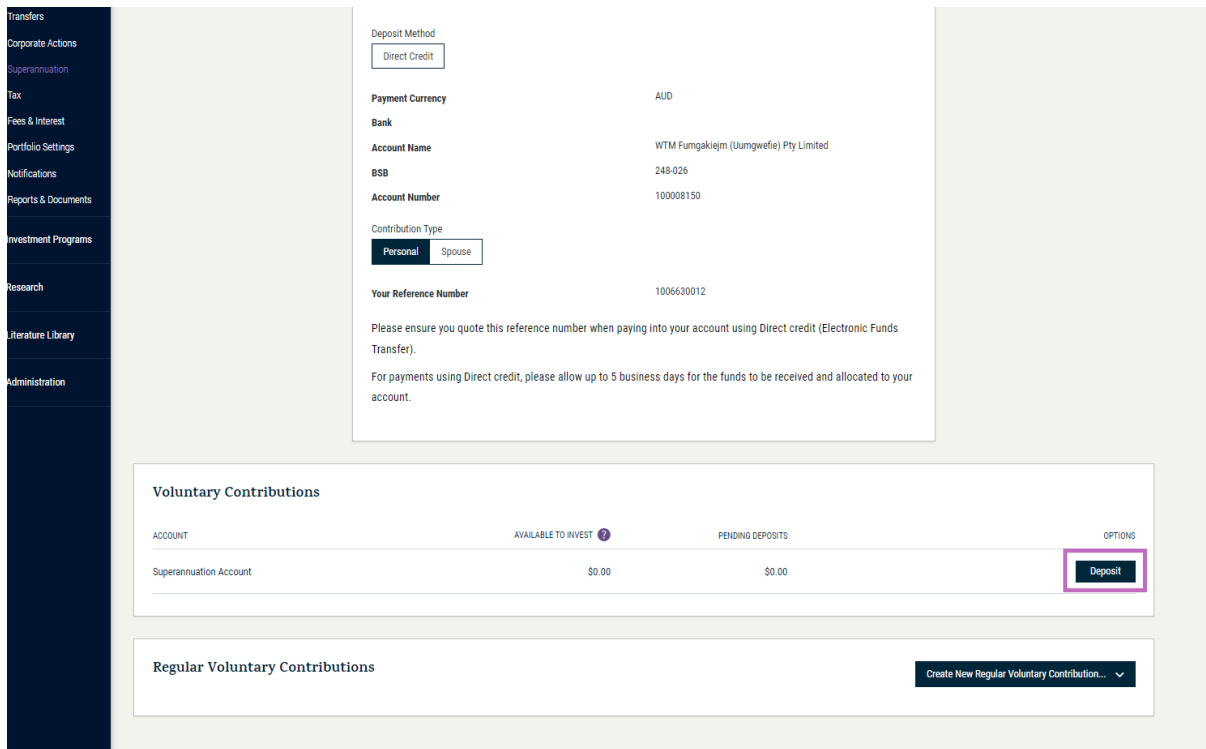
Adviser guide only.

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**



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



4. Enter the payment amount and select bank account. Click [Next step](#)

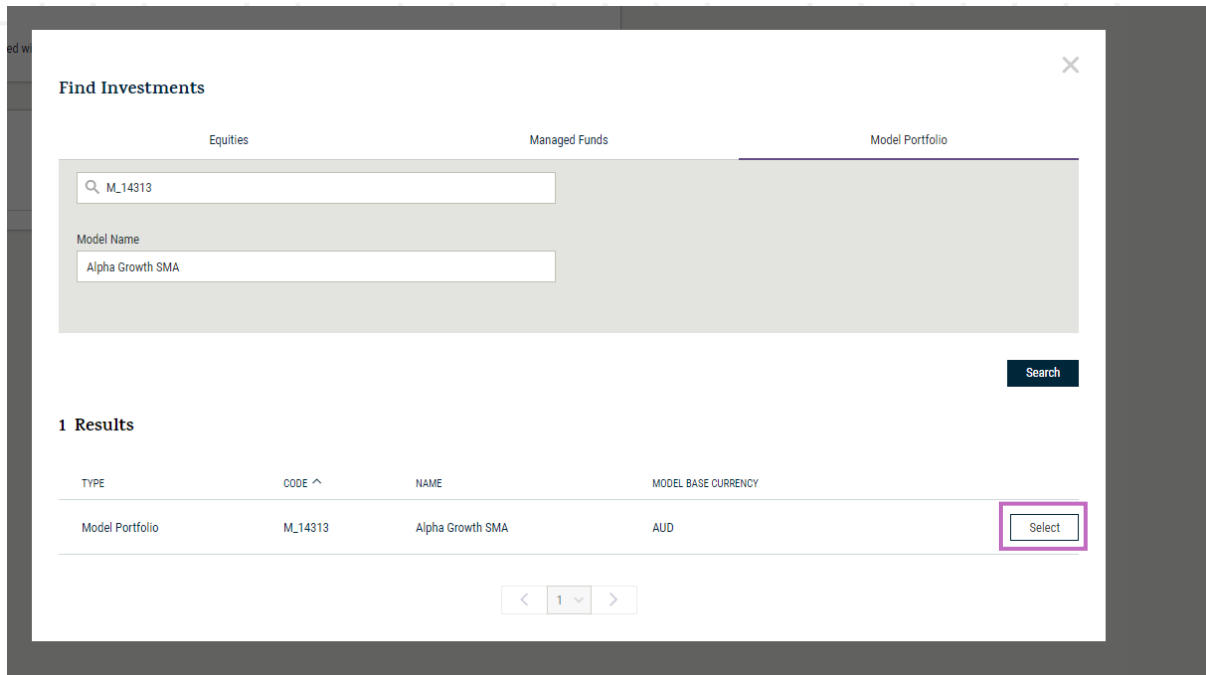
NOTE: If you are utilising the invest excess cash option, you do not need to complete the **Choose Investments** box. The funds will automatically be invested as per the invest excess cash option.

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

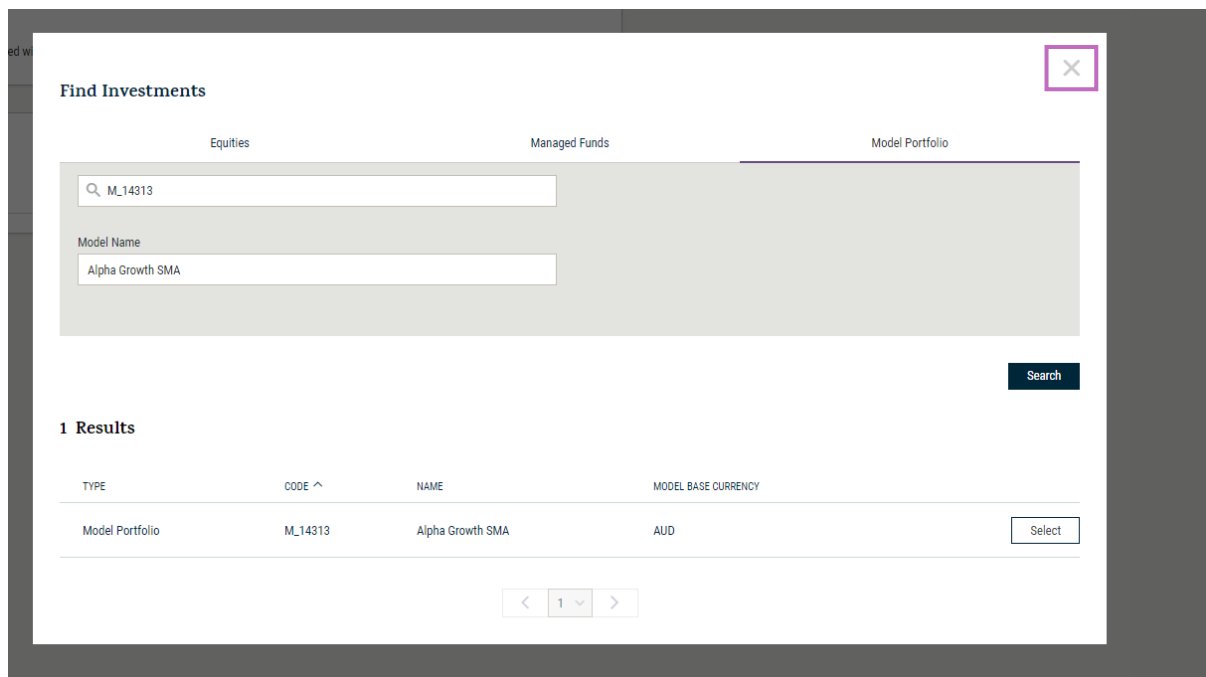
1. Click [Select Investments](#)

2. Search for the required investments

3. Click on **Select**



4. Close the **Find Investments** window



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

PLATFORM+ WRAP Contribute Into: Superannuation Account - PP6000500-242

Choose Investments

Anything not invested will be added as cash.

Selected Investments

INVESTMENT	PAYMENT
Alpha Growth SMA	\$ 100,000.00

Contribute

1. Deposit Options

2. Choose Investments

3. Summary

6. Review the details and click **Submit**

PLATFORM+ WRAP Contribute Into: Superannuation Account - PP6000500-242

Please Review These Details Before Submitting

Currency	AUD				
Payment Type	single				
Payment Method	Direct Debit				
Bank Account	484-799 10011002 - Jason Super				
Amount	\$100,000.00				
Selected Investments	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">INVESTMENT</th> <th style="text-align: right;">AMOUNT</th> </tr> </thead> <tbody> <tr> <td>Alpha Growth SMA</td> <td style="text-align: right;">\$100,000.00</td> </tr> </tbody> </table>	INVESTMENT	AMOUNT	Alpha Growth SMA	\$100,000.00
INVESTMENT	AMOUNT				
Alpha Growth SMA	\$100,000.00				

Contribute

1. Deposit Options

2. Choose Investments

3. Summary

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

PLATFORM+ WRAP Contribute Into: Superannuation Account - PP6000500-242

Please Review These Details Before Submitting

Currency	AUD				
Payment Type	single				
Payment Method	Direct Debit				
Bank Account	484-799 10011002 - Jason Super				
Amount	\$100,000.00				
Selected Investments	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">INVESTMENT</th> <th style="text-align: right;">AMOUNT</th> </tr> </thead> <tbody> <tr> <td>Alpha Growth SMA</td> <td style="text-align: right;">\$100,000.00</td> </tr> </tbody> </table>	INVESTMENT	AMOUNT	Alpha Growth SMA	\$100,000.00
INVESTMENT	AMOUNT				
Alpha Growth SMA	\$100,000.00				

Contribute

1. Deposit Options

2. Choose Investments

3. Summary

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.