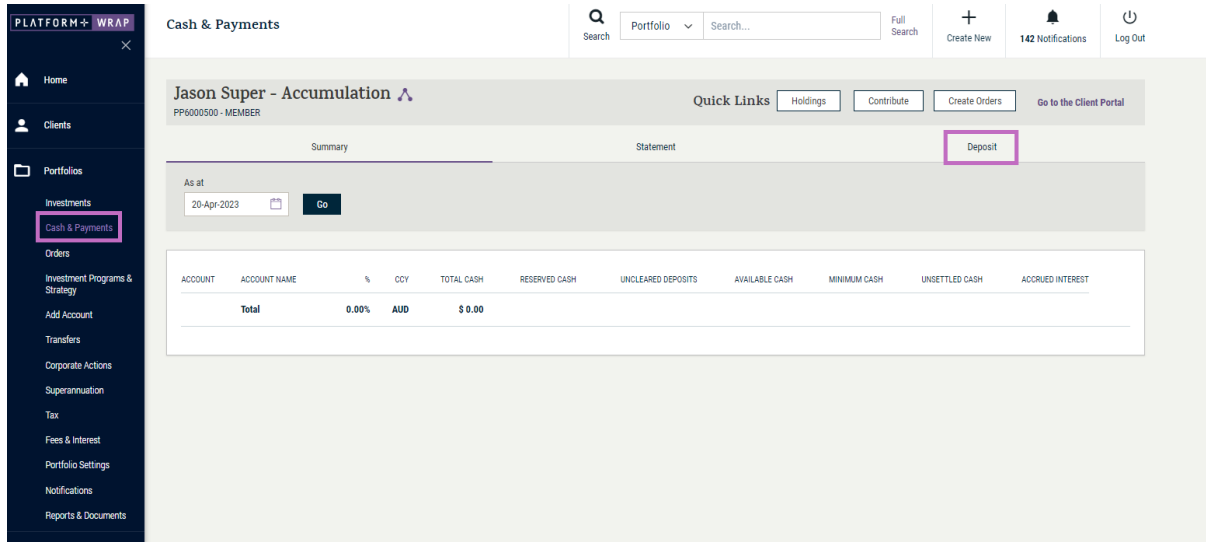


Creating an ongoing Direct Debit in an Accumulation Account

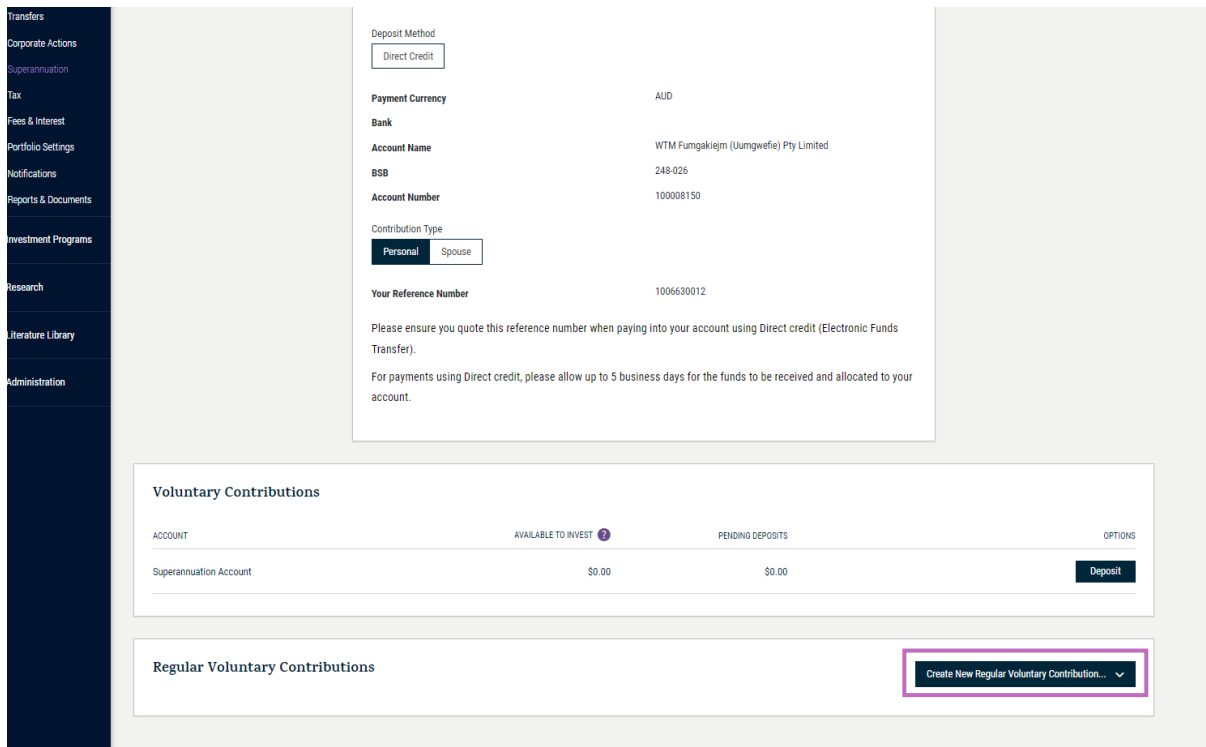
Adviser guide only.

This guide provides instructions on how to create an ongoing 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 **Create New Regular Voluntary Contributions** button



4. Click on **Superannuation Account**

Payment Currency AUD

Bank

Account Name WTM Fungakiejm (Uungwefie) Pty Limited

BSB 248-026

Account Number 100008150

Contribution Type
 Personal Spouse

Your Reference Number 1006630012

Please ensure you quote this reference number when paying into your account using Direct credit (Electronic Funds Transfer).
 For payments using Direct credit, please allow up to 5 business days for the funds to be received and allocated to your account.

ACCOUNT	AVAILABLE TO INVEST	PENDING DEPOSITS	OPTIONS
Superannuation Account	\$0.00	\$100,000.00	<input type="button" value="Deposit"/>
External Assets	\$0.00	\$0.00	<input type="button" value="Deposit"/>

Regular Voluntary Contributions

Create New Regular Voluntary Contribution...
 Superannuation Account >

5. Complete the **Payment Options** box and click **Next step**

Payment Options

Payment Currency
AUD - Australian Dollar

Payment Method
Direct Debit

Payment Amount
\$ 500.00

Bank Account
484-799 10011002 - Jason Super

Start Date
21-Apr-2023

Final Date (Optional)

Frequency
Quarterly

Create a Voluntary Contribution

1. Deposit Options

2. Choose Investments

3. Summary

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 alter way:

1. Click **Select Investments**.

Choose Investments

Anything not invested will be added as cash.

Selected Investments

INVESTMENT	REGULAR PAYMENT
------------	-----------------

Create a Voluntary Contribution

1. Deposit Options
2. Choose Investments
3. Summary

2. Search for the required investments

Find Investments

Equities
Managed Funds
Model Portfolio

Model Name

3. Click on Select

Find Investments

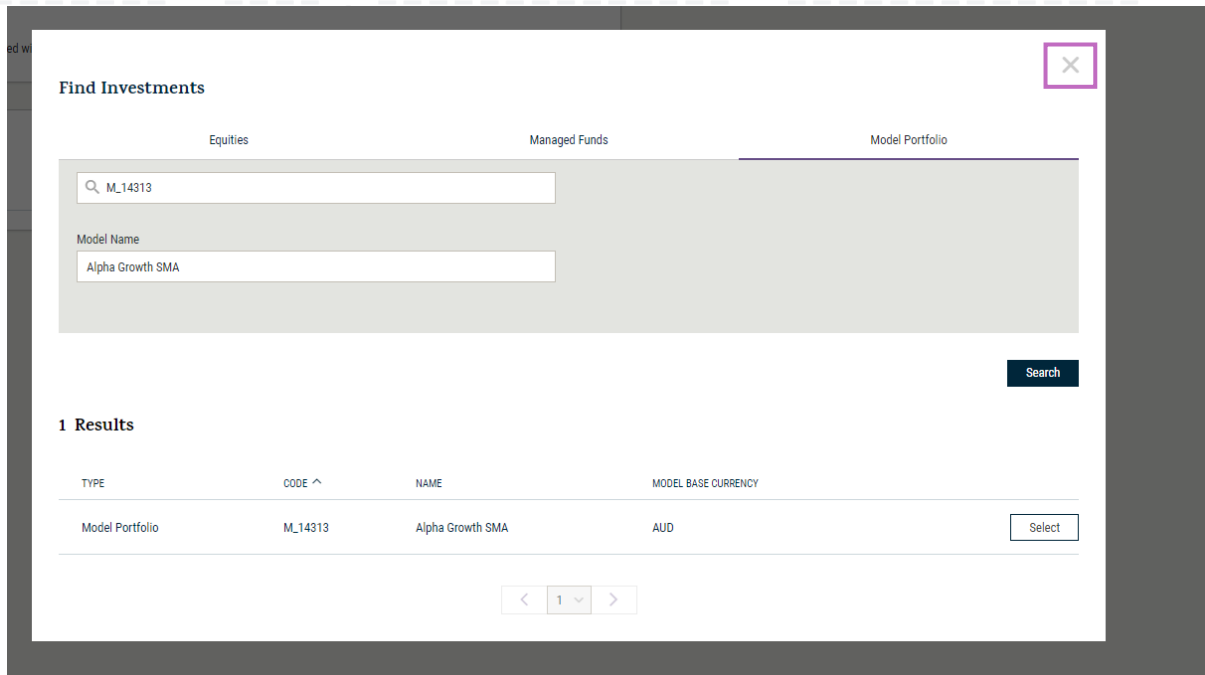
Equities
Managed Funds
Model Portfolio

Model Name

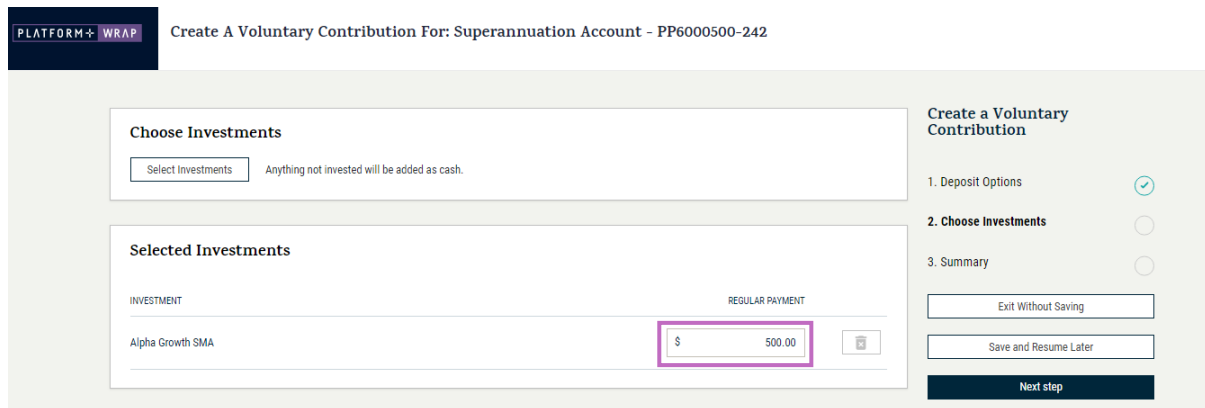
1 Results

TYPE	CODE ^	NAME	MODEL BASE CURRENCY
Model Portfolio	M_14313	Alpha Growth SMA	AUD

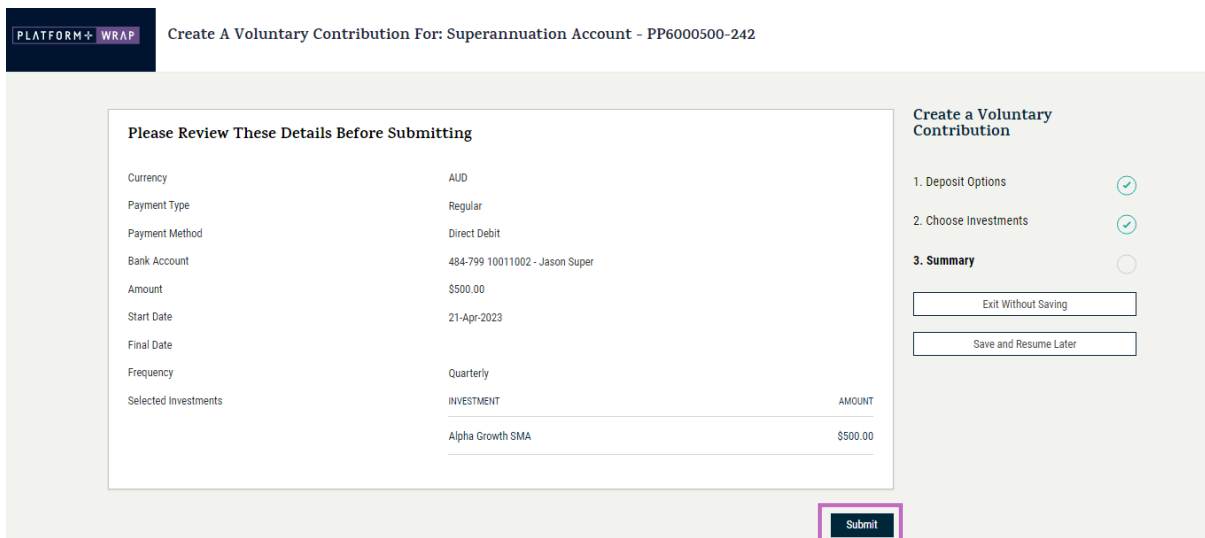
4. Close the Find Investments window



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



6. Review the details and click Submit



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

PLATFORM+ WRAP Create A Voluntary Contribution For: Superannuation Account - PP6000500-242

i Payment has been successfully submitted and is pending authorisation.

Please Review These Details Before Submitting

Currency	AUD				
Payment Type	Regular				
Payment Method	Direct Debit				
Bank Account	484-799 10011002 - Jason Super				
Amount	\$500.00				
Start Date	21-Apr-2023				
Final Date					
Frequency	Quarterly				
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;">\$500.00</td> </tr> </tbody> </table>	INVESTMENT	AMOUNT	Alpha Growth SMA	\$500.00
INVESTMENT	AMOUNT				
Alpha Growth SMA	\$500.00				

Create a Voluntary Contribution

1. Deposit Options ✔

2. Choose Investments ✔

3. Summary ✔

Exit

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.