

# Accept a Direct Debit

## Client guide only.





This guide provides instructions on how to accept a direct debit.

1. When your adviser sets up a direct debit you will receive an email notifying you to log into your account and accept

## Email Sample:

Unread Notifications Email

 noreply@platformpluswrap.com.au  
To: Rebecca Sherwell

 Reply  Reply All  Forward 

Thu 20/04/2023 8:47 PM



Hi Jason,

You have unread notifications from PlatformplusWRAP. Please log in to your account to view details. An overview of your pending notifications can be found below.

- You have 2 unread notifications where your action is required.

If you have any questions, talk to your Nominated Financial Adviser Billie PFAAAA0000001 on +61 07 00112233, or contact us on 1300 168 905. Lines are open 8.30 a.m. - 7 p.m. AEST from Monday to Friday (excluding national public holidays). You can also email us at [clientsupport@platformpluswrap.com.au](mailto:clientsupport@platformpluswrap.com.au)

### PlatformplusWRAP

Level 2, Cnr Maroochydhore Road & Evans Street, Maroochydhore | QLD 4558  
PO Box 1856, Sunshine Plaza | QLD 4558

<http://www.platformpluswrap.com.au/>



2. Once you have logged into the portal, navigate to **Administration**

The screenshot shows the user interface of the Platform Plus Wrap portal. At the top, there is a dark navigation bar with the Platform Plus Wrap logo and several icons for 'My Portfolios', 'My Notifications', 'My Details', and 'Log Out'. Below this is a secondary navigation bar with a home icon and menu items: 'Summary', 'Accounts', 'Investments', 'Cash & Payments', 'Orders', 'Superannuation', 'Administration' (highlighted with a pink box), and 'Documents'. The main content area is titled 'Jason Super - Accumulation - Super Portfolio' and 'My Portfolio Summary' (As at 20 April 2023). It features several summary cards: 'Regular Payments' (Fund your investment strategies...), 'My Net Worth' (\$0.00) with a table of assets and debts, 'Portfolio Valuation' (\$0.00), 'Geographic Diversification' (You currently have no investments to report on), 'Asset Allocation' (You currently have no investments), and 'Performance' (Since Portfolio Opened). A 'Manage Widgets' button is visible at the bottom of the Asset Allocation card.

| ASSETS AND DEBTS       | VALUE  |
|------------------------|--------|
| On Platform Portfolios | \$0.00 |
| Financial Assets       | \$0.00 |
| Non-Financial Assets   | \$0.00 |
| Debts and Liabilities  | \$0.00 |

| ACCOUNT                | VALUE  | LAST 30 DAYS |
|------------------------|--------|--------------|
| Superannuation Account | \$0.00 | N/A          |

3. Under the **Authorisations** tab, you will see the deposit awaiting your approval

Jason Super - Accumulation - Super Portfolio

### My Portfolio Administration

As at 20 April 2023

Filter Accounts: Jason Super - Accumulation

Authorisations 2 | Fees and Charges | Corporate Actions | Transfers | Tax

From: 20/04/2023 To: 20/04/2023 Since Inception 3M 1Y Show:  Open authorisations  Complete authorisations

| EVENT                          | DATE STARTED | ACCOUNT NUMBER | ACCOUNT NAME               | PROGRESS                         |                  |
|--------------------------------|--------------|----------------|----------------------------|----------------------------------|------------------|
| <span>+</span> Regular Deposit | 20/04/2023   | PP6000500-242  | Jason Super - Accumulation | <div style="width: 100%;"></div> | Authorise Reject |
| <span>+</span> One-off Deposit | 20/04/2023   | PP6000500-242  | Jason Super - Accumulation | <div style="width: 100%;"></div> | Authorise Reject |

4. To view the details of the regular or on-off deposit, click on the cross in the middle

Jason Super - Accumulation - Super Portfolio

### My Portfolio Administration

As at 20 April 2023

Filter Accounts: Jason Super - Accumulation

Authorisations 2 | Fees and Charges | Corporate Actions | Transfers | Tax

From: 20/04/2023 To: 20/04/2023 Since Inception 3M 1Y Show:  Open authorisations  Complete authorisations

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| <span>+</span> One-off Deposit | 20/04/2023   | PP6000500-242  | Jason Super - Accumulation | <div style="width: 100%;"></div> | Authorise Reject |

5. Review your payment details and either **Authorise** or **Reject**. Should you reject the order, please inform your adviser

Jason Super - Accumulation - Super Portfolio

### My Portfolio Administration

As at 20 April 2023

Filter Accounts: Jason Super - Accumulation

Quick Links

Authorisations **2** Fees and Charges Corporate Actions Transfers Tax

From: 20/04/2023 To: 20/04/2023 Since Inception 3M 1Y Show:  Open authorisations  Complete authorisations

| EVENT           | DATE STARTED | ACCOUNT NUMBER | ACCOUNT NAME               | PROGRESS                         |
|-----------------|--------------|----------------|----------------------------|----------------------------------|
| Regular Deposit | 20/04/2023   | PP6000500-242  | Jason Super - Accumulation | <div style="width: 100%;"></div> |

**Payment Details**

|            |             |                     |                        |
|------------|-------------|---------------------|------------------------|
| Amount     | \$500.00    | Until               | Until Cancelled        |
| Currency   | AUD         | Method              | Direct Debit           |
| Frequency  | Quarterly   | Bank Account Number | MET ****-****-****1002 |
| Start Date | 21 Apr 2023 |                     |                        |

**Order Details**

|                 |                  |
|-----------------|------------------|
| Investment Name | Alpha Growth SMA |
| Value           | \$500.00         |
| Order Type      | Buy              |
| Investment Code | M_14313          |

- A validation code will be sent to your mobile. Enter the code in the validation code box. Click **Continue**

We've sent you a validation code Exit X

Please enter the validation code in the text message that was sent to \*\*\*\*\*0220.

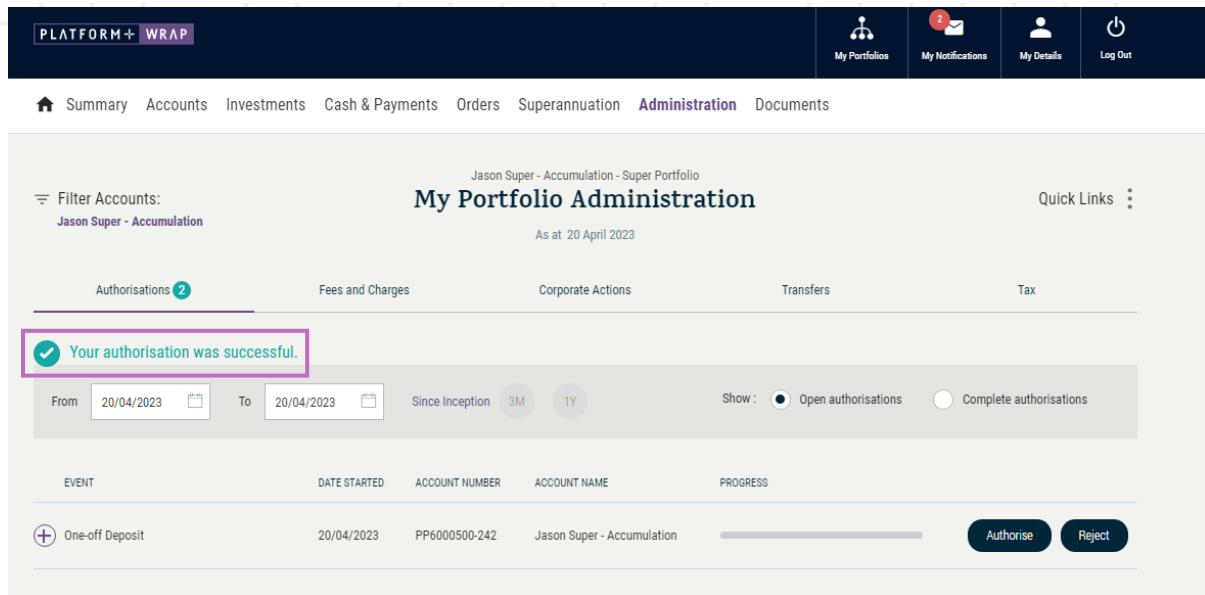
Validation code

224819

**Continue**

Didn't receive the text message?  
Send it again

7. When you have successfully authorized the Direct Debit, you will see the following message



Should you have any questions or require any additional information in relation to this guide, please contact your Financial Adviser or the PlatformplusWRAP Client Support Centre on 1300 168 905 or [clientsupport@platformpluswrap.com.au](mailto:clientsupport@platformpluswrap.com.au).