Accepting an Ongoing Adviser Fee

Client guide only.

This guide provides instructions on how to accept an Ongoing Adviser Fee.

1. You will receive an email notifying you to log into your account and accept the fee

Email Sample:

You have a pending authorisation on Platform

PW noreply@platformpluswrap.com.au
To Rebecca Sherwell

PLATFORM+ WRAP
INVESTMENT AND SUPER
Name: Jason Super
User ID: JSuper189

Reminder - Log in to PlatformplusWRAP to approve outstanding authorisation requests.

Hi Jason,

You have a pending authorisation awaiting your approval in the below portfolio.

Portfolio name:

- Jason Super - Accumulation:

Pending authorisation:

- Ongoing Fee Arrangement

To view and approve this authorisation, please log in to PlatformplusWRAP at https://login.platformpluswrap.com.au.

Pending authorisations are visible under the Administration menu.

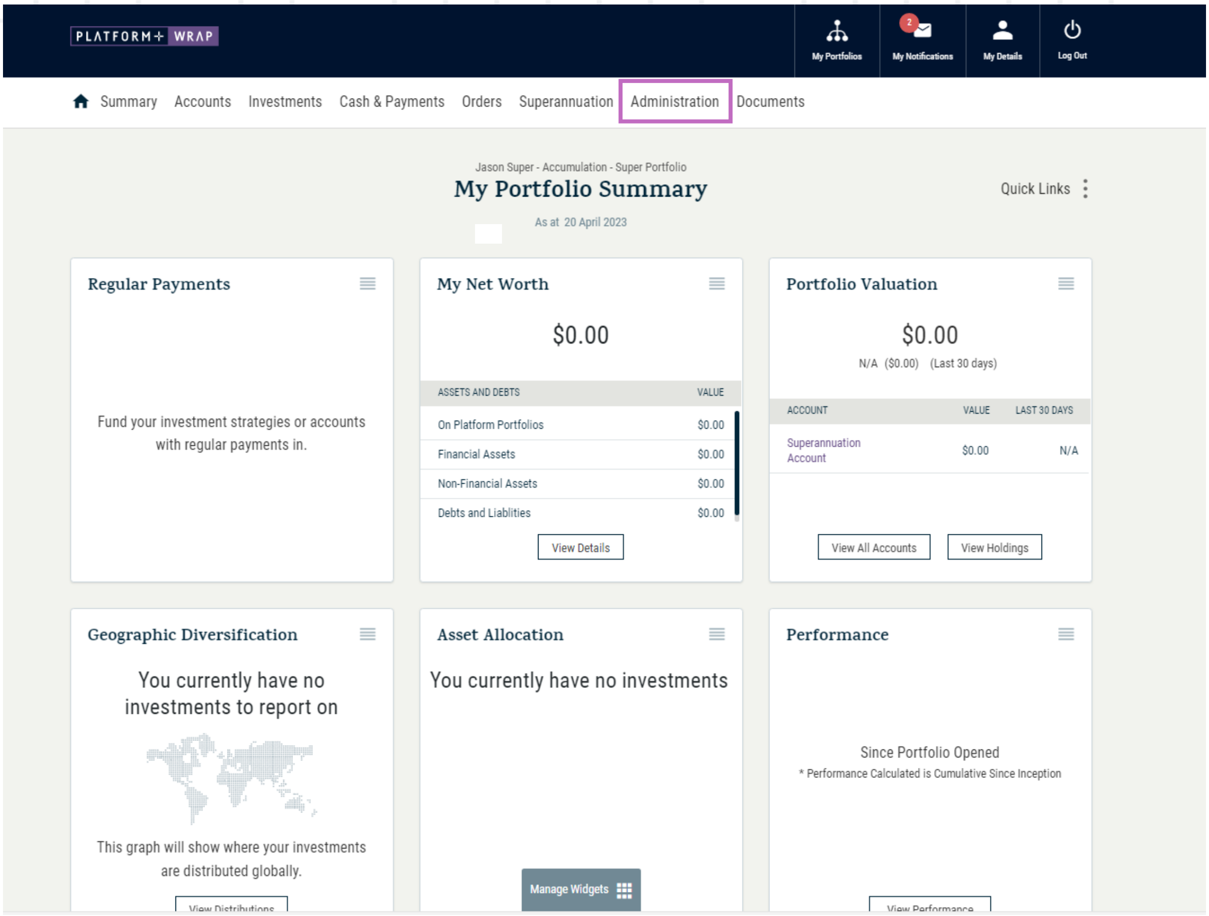
If you have any questions, contact us on 1300 168 905. Lines are open 8.30 a.m. - 7 p.m. AEST from Monday to Friday (excluding national public holidays). You can also email us at clientsupport@platformpluswrap.com.au

PlatformplusWRAP

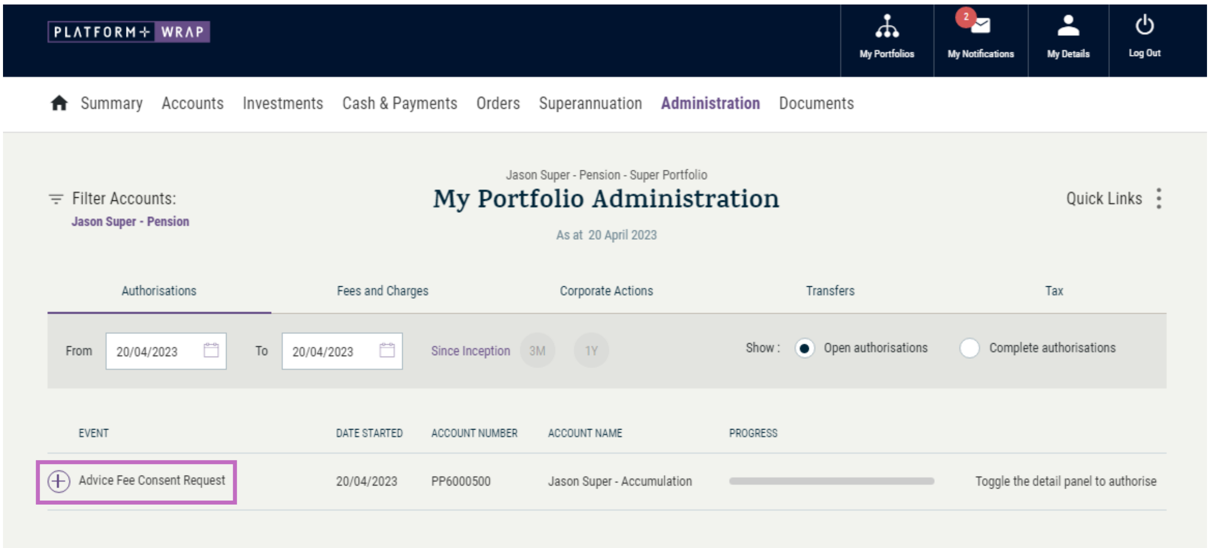
Level 2, Cnr Maroochydore Road & Evans Street, **Maroochydore** | QLD 4558
PO Box 1856, **Sunshine Plaza** | QLD 4558

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

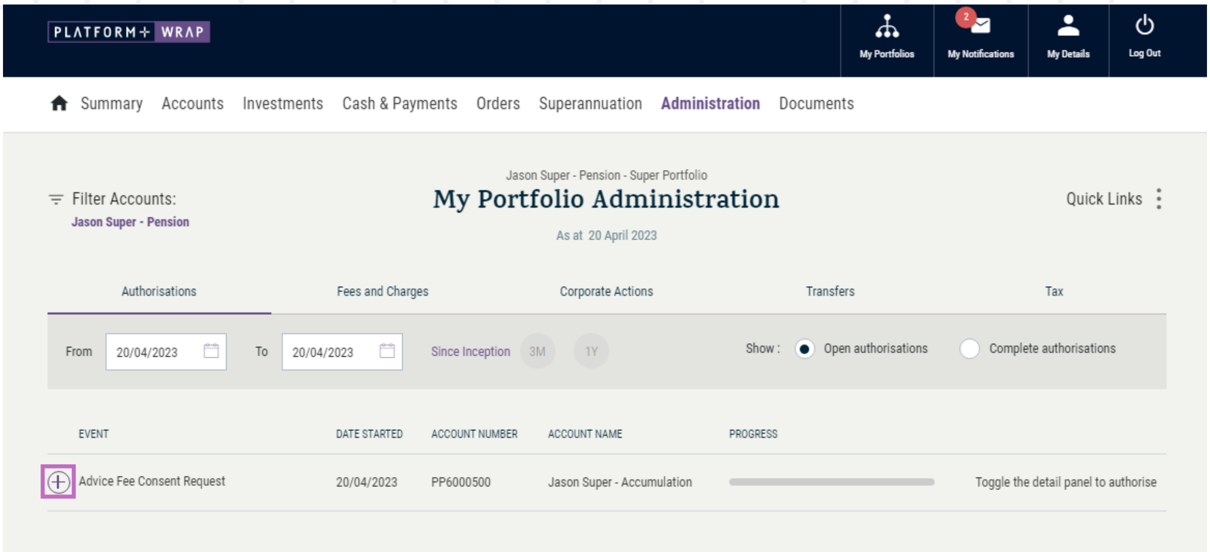
2. Once you have logged into the portal, navigate to **Administration**



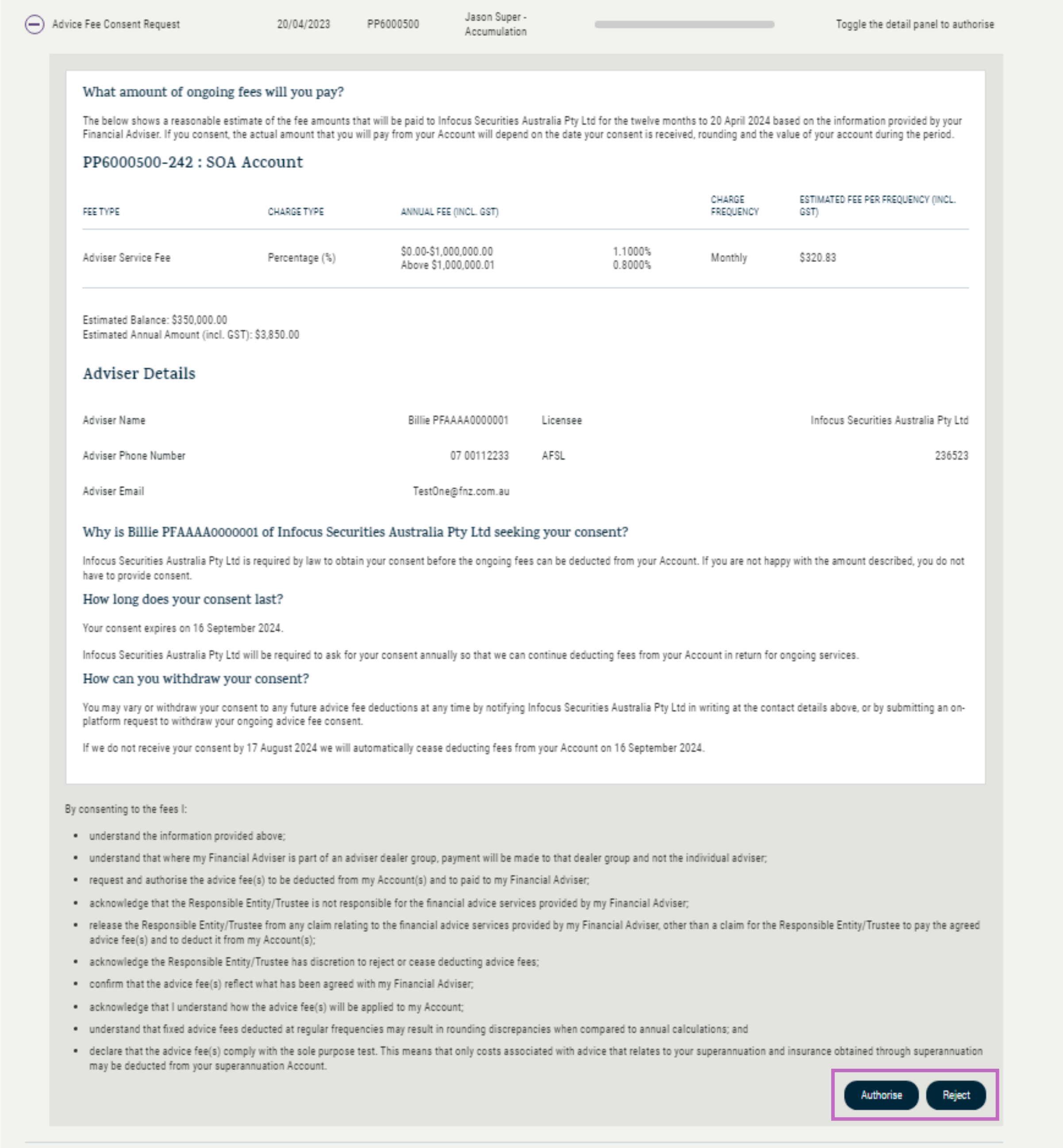
3. Under the **Authorisations** tab, you will see the **Advice Fee Consent Request** awaiting your approval



4. To view the details of the **Advice Fee Consent Request**, click on the cross in the middle

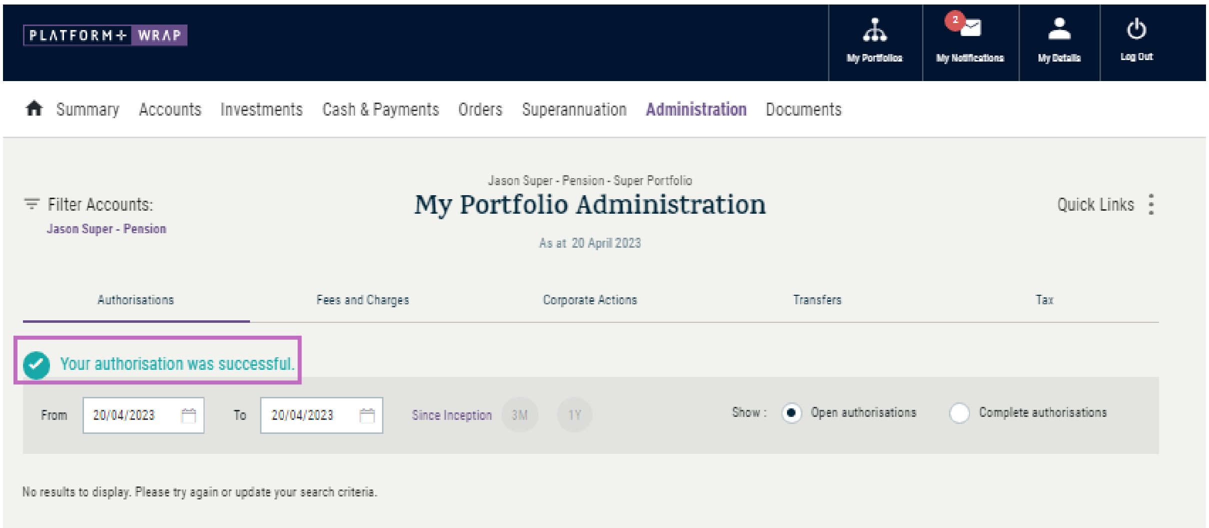


5. Review the fee details and either **Authorise** or **Reject**. Should you reject the order, please inform your adviser



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

7. When you have successfully authorised the ongoing adviser fee, 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.