

# Accepting an Investment Menu Change

**Client guide only.**

This guide provides instructions on how to accept a change in the menu option.

## 1. Click Administration

The screenshot shows the 'My Portfolio Summary' page. The top navigation bar includes 'Administration' which is highlighted with a red box. The main content area is divided into several sections:

- Regular Payments:** Fund your investment strategies or accounts with regular payments in.
- My Net Worth:** \$0.00. Includes a table for ASSETS AND DEBTS: On Platform Portfolios (\$0.00), Financial Assets (\$0.00), Non-Financial Assets (\$0.00), and Debts and Liabilities (\$0.00).
- Portfolio Valuation:** \$0.00 (N/A (\$0.00) (Last 30 days)). Includes a table for ACCOUNT: Superannuation Account (\$0.00, N/A).
- Geographic Diversification:** You currently have no investments to report on. Includes a world map icon and a 'View Distributions' button.
- Asset Allocation:** You currently have no investments. Includes a 'View Analysis' button.
- Change in Portfolio Value:** As at 04/10/2023. Includes a table: You Started With (\$0.00), You Deposited and Withdrew (\$0.00), Your Investments Returned (\$0.00), and You Ended Up With (\$0.00). Includes a 'Make a Contribution' button.

## 2. Click on Authorisations and expand the Event

The screenshot shows the 'My Portfolio Administration' page. The 'Authorisations' tab is highlighted with a red box. The page includes a filter section for accounts and a table of authorisation events.

**Filter Accounts:** Bec Test - Accumulation

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

From: 06/09/2023 To: 05/10/2023 Since Inception: 3M 1Y Show:  Open authorisations  Complete authorisations

EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS	
<b>Menu Selection Change</b>	02/10/2023	PP6001433	Bec Test - Accumulation	<div style="width: 100%;"></div>	Toggle the detail panel to authorise

- Review the information and click on the PDS Link. This will open the PDS in a new window and tick the check box

The screenshot displays the 'My Portfolio Administration' page for 'Bec Test - Accumulation - Super Portfolio' as of 05 October 2023. The interface includes a navigation bar with 'Administration' highlighted, and a filter section for 'Bec Test - Accumulation'. The main content area shows a 'Menu Selection Change' event on 02/10/2023 for account PP6001433, with a progress bar and a 'Toggle the detail panel to authorise' link. The 'Menu Selection Change Details' section shows a change from 'Core' to 'Select' menu, effective from 01 Oct 2023. Below this, there is a declaration section with a list of terms and conditions. A section titled 'Please read the following document before authorising:' contains a checkbox and a link to the 'PlatformplusWRAP Product Disclosure Statement (PDS)\*'. At the bottom right, there are 'Authorise' and 'Reject' buttons. A note states '\* Will open in a new tab.'

4. Click the **Authorise** button

The screenshot shows the 'My Portfolio Administration' interface for 'Bec Test - Accumulation - Super Portfolio' as of 05 October 2023. The 'Authorisations' tab is active, displaying a table with one entry: 'Menu Selection Change' on 02/10/2023 for account PP6001433. A detailed view of this change is shown below, indicating a transfer from 'Core' to 'Select' menu, effective 01 Oct 2023. A declaration section follows, and a checkbox for 'PlatformplusWRAP Product Disclosure Statement (PDS)\*' is checked. The 'Authorise' button is highlighted with a red box.

5. Once successfully authorised, you will receive the following message

The screenshot shows the same 'My Portfolio Administration' interface, but now with a green success message: 'Your authorisation was successful.' The 'Authorisations' tab remains active, and the 'Authorise' button is no longer visible, indicating the process is complete.

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](mailto:support@platformplus.com.au).