

## Accepting an Ongoing Fee Renewal

## Client guide only.

This guide provides instructions on how to accept an ongoing fee renewal agreement.

1. Once logged into your portal, click Administration

PLATFORM+ WRAP		My Portfolics My Notifications My Details Log Dut	
♠ Summary Accounts Investments Cash & Pa	syments Orders Superannuation Administration Docu	uments	
	Bec Test - Accumulation - Super Portfolio My Portfolio Summary As at 05 October 2023	Quick Links	
Regular Payments 🔤	My Net Worth = \$0.00	Portfolio Valuation \$0.00 N/A (\$0.00) (Lest 30 days)	
Fund your investment strategies or accounts with regular payments in.	ASSETS AND DEBTS VALUE On Platform Portfolios \$0.00 Financial Assets \$0.00	ACCOUNT VALUE LAST 30 DAYS Superannustion \$0.00 N/A	
	Non-Financial Assets \$0.00 Debts and Liabilities \$0.00 View Details	View All Accounts View Holdings	
Geographic Diversification	Asset Allocation	Change in Portfolio Value	
investments to report on	You currently have no investments	You Started With \$0.00	
~15 <sup>9</sup> with 7*		You Deposited and Withdrew \$0.00	
		Your Investments Returned \$0.00	
This graph will show where your investments are distributed globally.		You Ended Up With \$0.00	
View Distributions	View Analysis	Make a Contribution	

2. Click on Authorisations and expand the Event

PLATFORM+ WRAP					My Portfolios	2 My Notifications	My Details	ل Log Out
♠ Summary Accounts I	nvestments Cash & Payme	ents Orders S	Superannuation Ad	ministration Documen	ts			
➡ Filter Accounts: Bec Test - Accumulation	Bec Test - Accumulation - Super Portfolio       ter Accounts:     My Portfolio Administration     Quick Links       Test - Accumulation     As at 06 October 2023							
Authorisations	Fees and Charges		Corporate Actions	Transf	ers	Tax		
From 05/10/2023	To 06/10/2023	Since Inception 3M	1Y	Show:  Ope	en authorisations	Comple	te authorisations	s
EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS				
(+) Advice Fee Consent Request	06/10/2023	PP6001591	Bec Jones- Pension			Toggle the	edetail panel to a	authorise



INVESTMENT AND SUPER

Authorise Reject

## 3. Review the information and click Authorise

	EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAI	/IE PROG	RESS				
∋	Advice Fee Consent Request	06/10/2023	PP6001591	Bec Jones- Pension	-			Toggle the detail panel to authorise		
	What amount of ongoing fer The below shows a reasonable estima your Financial Adviser. If you consent, period.	es will you pay? the of the fee amounts the actual amount that	hat will be paid to Infoct you will pay from your A	us Securities Au Account will dep	stralia Pty Ltd fo end on the date	or the twelve mont your consent is re	hs to 6 October 2024 ceived, rounding and t	based on the information provided by he value of your account during the		
	FEETVPE	CHARGE TYPE	ANNUAL FEE (IN	ICL. GSTI			CHARGE FREDUENCY	ESTIMATED FEE PER FREQUENCY (INCL. GST)		
	Adviser Service Fee	Fixed (\$)	\$2,500.00				Monthly	\$208.33		
	Estimated Annual Amount (incl. GST):	\$2,500.00								
	Adviser Details									
	Adviser Name		Jordan PFAAA	A0000001	Licensee			Infocus Securities Australia Pty Ltd		
	Adviser Phone Number		07	00112233	AFSL			236523		
	Adviser Email	Adviser Email TestOne@fnz.com.au								
	Why is Jordan PFAAAA00000 Infocus Securities Australia Pty Ltd is have to provide consent. How long does your consent Your consent expires on 4 March 2023 Infocus Securities Australia Pty Ltd wi How can you withdraw your You may vary or withdraw your conser platform request to withdraw your conser If we do not receive your consent by 2	DOI of Infocus Sect required by law to obtain last? 5. III be required to ask for consent? It to any future advice for poing advice fee consen February 2025 we will a	urities Australia P n your consent before the your consent annually s te deductions at any time t. uutomatically cease ded	ty Ltd seeki he ongoing fees to that we can c he by notifying In ucting fees from	ing your con can be deducte ontinue deducti focus Securitie a your Account d	isent? d from your Accoung ng fees from your A s Australia Pty Ltd on 4 March 2025.	nt. If you are not happ Account in return for o	ny with the amount described, you do not ingoing services.		
	By consenting to the fees I: understand the information provided understand that where my Financial request and authorise the advice fee acknowledge that the Responsible E release the Responsible Entity/Trust advice fee(s) and to deduct it from n acknowledge the Responsible Entity, confirm that the advice fee(s) reflect acknowledge that I understand how understand that fixed advice fee(s) compl may be deducted from your superan	I above; Adviser is part of an ad (s) to be deducted from ntity/Trustee is not resp ee from any claim relati ny Account(s); (Trustee has discretion : what has been agreed : whe has been agreed the advice fee(s) will be ducted at regular frequest y with the sole purpose y with the sole purpose	riser dealer group, paym my Account(s) and to p onsible for the financial ng to the financial advic to reject or cease deduc with my Financial Advis applied to my Account; incies may result in rour test. This means that or	tent will be mad baid to my Finan I advice services e services provi tting advice feer er; nding discrepan nly costs associ	e to that dealer cial Adviser; s provided by my ded by my Finar s; cies when comp ated with advice	group and not the i r Financial Adviser, ncial Adviser, other ared to annual call e that relates to you	individual adviser; ; than a claim for the R culations; and ar superannuation and	lesponsible Entity/Trustee to pay the agreed		



- 4. A pop-up box will then appear for you to enter a verification code. This code will be sent to your mobile
- 5. Enter code and click Continue

Adviser De <mark>tails</mark>					
Adviser Name		We've sent you a verification code		Exit 🗙	urities Australia Pty Ltd
Adviser Phone Nu	_				236523
Idviser Fmail	Please enter	the verification code in the message that was sent to ***	*****0220.		
		Verification code			
Why is Jorda					
nfocus Securities	L				described, you do not
nave to provide oc		Continue			
How tong doe					
our consent exp		Didn't receive the message?			
nfocus Securities		Send it again			
How can you					
	and the set of the set of the	las deductions at sec time has notificing inference Consulting Acatedia Da 1 an	in unities of the sec	at a standar all shares	as he submitting as as

6. When successfully authorised, you will receive the following message

	PLATFORM+ WRAP				My Portfolios	2 My Notifications	My Details	ل Log Out	
	♠ Summary Accounts Investme	ents Cash & Payments Orde	ers Superannuation Administ	ration Document	ts				
	〒 Filter Accounts: Bec Test - Accumulation	ation			Quick	Links 🚦			
	Authorisations	Fees and Charges	Corporate Actions	Transfe	rs		Tax		
[	Vour authorisation was successfi From 05/10/2023  To 04	UI. 6/10/2023 😁 Since Inceptio	a 3M 1Y	Show: 💿 Oper	n authorisations	O Comple	te authorisation	5	
	No results to display. Please try again or update y	your search criteria.							

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 <a href="mailto:support@platformplus.com.au">support@platformplus.com.au</a>.