

Changing the Investment Menu on a Portfolio

Adviser guide only.

This guide provides instructions on how to change the investment menu option.

1. Once in the client portfolio, click on **Portfolio Settings**

PLA	TFORM⊹ WRAP ×	Investments	Q Search Portfolio ~ Search	Full + U Search Create New 67 Notifications Log Out	
٨	Home	Bec Test - Accumulation 🔥	Quick Links Hol	dings Contribute Create Orders Go to the Client Portal	
÷	Clients	PP0001433 - MEMBER Summary Holding	Asset Allocation	Performance Investment Transactions	
Đ	Portfolios Investments Cash & Payments	Date Include External Assets? 02-00t-2023 Go Yes No			
	Orders Investment Programs & Strategy Add Account	Portfolio Value \$0.00	Performance Since Inception	Asset Distribution	
	Transfers Corporate Actions	ACCOUNT NAME VALUE Superannuation Account \$0.00			
	Superannuation Tax Fees & Interest Portfolio Settings		There is no performance data to display.	There is no asset distribution data to display.	
	Notifications Reports & Documents	View Details			

2. Under Portfolio Details, click the pencil icon within the Details box

Bec Test - Accumulation 🔥			Quick Links Holdings Contribute Create Orders Go to the Client Portal						
Portfolio Details	Contact Details	Banking Details	Foreign Tax Compliance	Standing Authority	View Related Parties	Terms & Signatories			
 Details 									
Portfolio Name		Bec Test - Accu	mulation						
Portfolio Type		Super	Super						
Legal Entity Sub Type		Accumulation	Accumulation						
Adviser		Jordan PFAAAA	Jordan PFAAAA0000001						
Adviser Delegated Authority		Has transact ac	Has transact access						
Company		Company Name	Company Name PFAAAA						
Portfolio Status		Active	Active						
Reporting Currency		AUD							
External Account Number									
Portfolio Signatory Setting		No Authorisatio	in						
Household Name		Fee Test (PP90	01434)						
Menu Selection		Core							



INVESTMENT AND SUPER

3. Go to Menu Selection and click Update

Bec Test - Accumul PP6001433 - MEMBER	lation 🔥		Quic	k Links Holdings	Contribute Create Orders	Go to the Client Portal
Portfolio Details	Contact Details	Banking Details	Foreign Tax Compliance	Standing Authority	View Related Parties	Terms & Signatories
 Details 						Save Cancel
Portfolio Name		Bec Test - Accu	umulation			
Portfolio Type		Super				
Legal Entity Sub Type		Accumulation				
Adviser		Jordan PFAAAA0	Jordan PFAAAA0000001			
Adviser Delegated Authority		Requires transa	act access	~		
Company		Company Name	PFAAAA			
Portfolio Status	lio Status			~		
Reporting Currency		AUD		~		
External Account Number						
Portfolio Signatory Setting		No Authorisatio	on	~		
Household Name		Fee Test (PP90	001434)	~		
Menu Selection		Core		Update		

4. Update Effective Date and click Next step

Note: The change to the investment menu will show the day after the nominated date.

Change Of Product Choice		Product Choice	
From Core	To Select	1. Change of Product Choice	\odot
Effective Date		2. Review and Submit	\bigcirc
		Exit Without Saving	
		Save and Resume Later	
		Next step	

5. Review and Submit

Pleas	e Review The Details Below Before Submitting		Product Choice		
Θ	Step 1 - Product Choice	100%	1. Change of Product Choice	\oslash	
	Current Product	Core		2. Review and Submit	\oslash
	New Product	Select		Exit Without Saving Save and Resume Later	
	Effective Date	2/10/2023			
	Producted Instruments (1)142	None			
	resultieu insuumenis neu r			Submit	



6	Once successfully	submitted t	he following	message wi	ll annaar
0.	once successfully	Submitted, t	ne ronowing	message m	ii appeai

Pleas	e Review The Details Below Before Submitting	Product Choice			
0	Client changes submitted for authorisation.	1. Change of Product Choice	\odot		
Θ	Step 1 - Product Choice	100%	2. Review and Submit	\odot	
	Current Product	Core		Exit	
	New Product	Select			
	Effective Date	2/10/2023			
	Restricted Instruments Held?	None			



Note: *The client will then need to login and accept – please refer to investor acceptance guide.*

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.