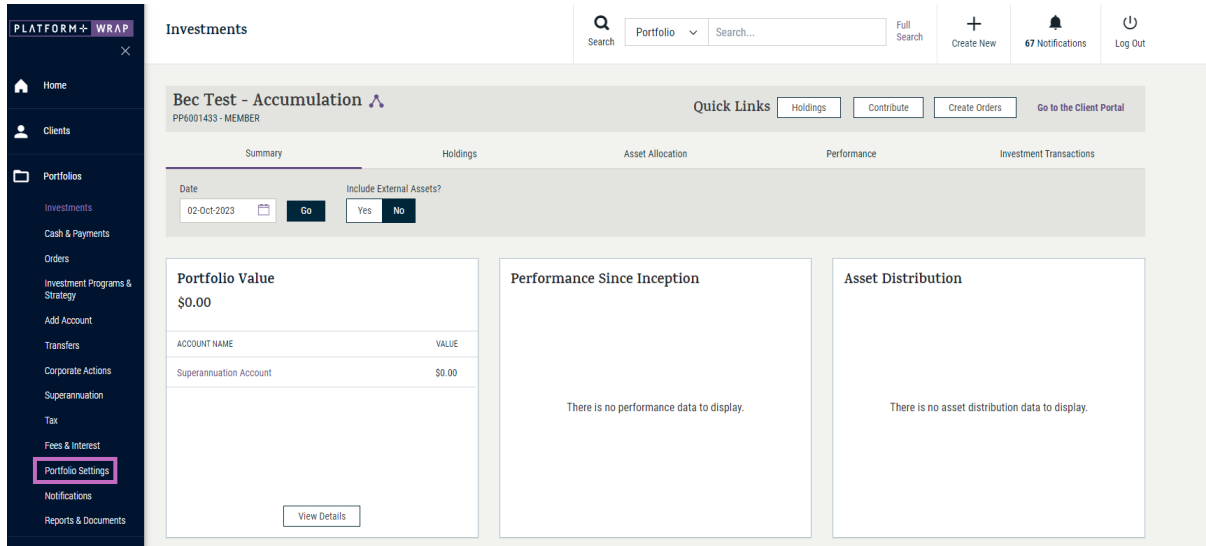


# Changing the Investment Menu on a Portfolio

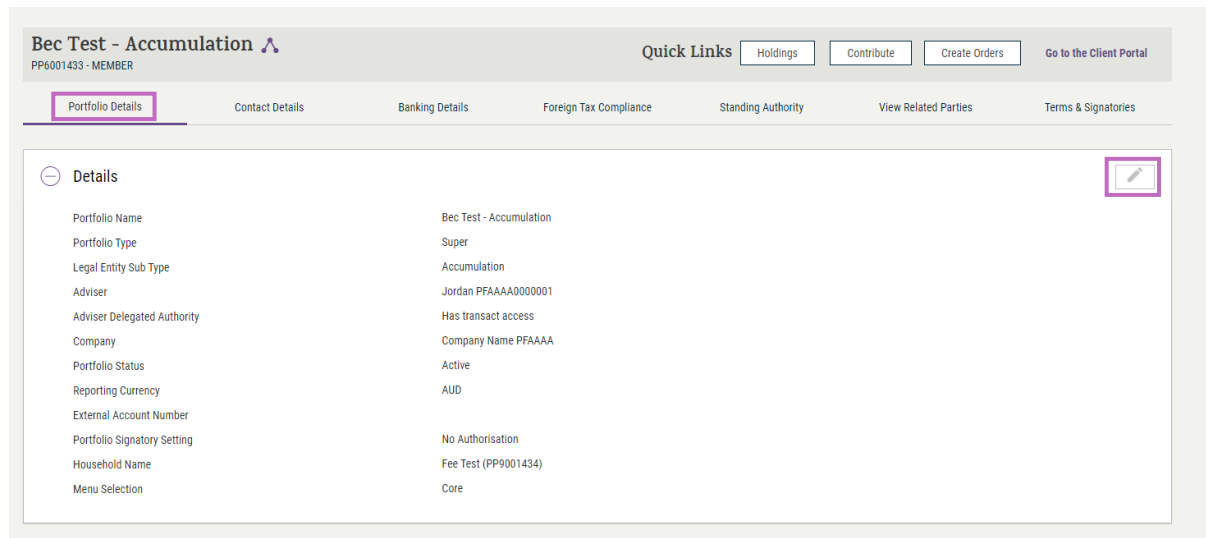
**Adviser guide only.**

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

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



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



3. Go to **Menu Selection** and click **Update**

**Bec Test - Accumulation** PP6001433 - MEMBER

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** Save Cancel

Portfolio Name: Bec Test - Accumulation

Portfolio Type: Super

Legal Entity Sub Type: Accumulation

Adviser: Jordan PF6001433

Adviser Delegated Authority: Requires transact access

Company: Company Name PF6001433

Portfolio Status: Active

Reporting Currency: AUD

External Account Number: [Empty]

Portfolio Signatory Setting: No Authorisation

Household Name: Fee Test (PP6001433)

Menu Selection 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**

From: Core To: Select

Effective Date: 02-Oct-2023

**Product Choice**

1. Change of Product Choice

2. Review and Submit

Exit Without Saving

Save and Resume Later

**Next step**

5. Review and **Submit**

**Please Review The Details Below Before Submitting**

**Step 1 - Product Choice** 100%

Current Product: Core

New Product: Select

Effective Date: 2/10/2023

Restricted Instruments Held?: None

**Product Choice**

1. Change of Product Choice

2. Review and Submit

Exit Without Saving

Save and Resume Later

**Submit**

6. Once successfully submitted, the following message will appear

**Please Review The Details Below Before Submitting**

i Client changes submitted for authorisation.

**Step 1 - Product Choice** 100%

Current Product	Core
New Product	Select
Effective Date	2/10/2023
Restricted Instruments Held?	None

**Product Choice**

1. Change of Product Choice ✔

2. Review and Submit ✔

Exit



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