

PRODUCT UPDATE

Platformplus Super Wrap

11 December 2023

This Product Update should be read together with the Platformplus Super Wrap Product Disclosure Statement (dated 30 September 2022) issued by Equity Trustees Superannuation Ltd (ABN 50 055 641 757, AFSL 229757, RSE License No. L0001458) as Trustee of the Platformplus Super Wrap (ABN 18 906 079 389, RSE R1078770, USI 18906079389001).

ADVICE FEES – FIXED TERM ARRANGEMENTS

Section 6 Fees and Costs (page 52)

In addition to ongoing advice fee arrangements, advice fees may also be charged by your Financial Adviser on a fixed term basis.

Where you establish a fixed term arrangement with your Financial Adviser, a fixed term fee will apply only for the period agreed to by you and your adviser. The term cannot be more than twelve (12) months and the fixed term fee will cease once the “end date” of your fixed term arrangement is reached. To establish a new fixed term arrangement, you will need to complete a new request via your Financial Adviser. You cannot pay both an ongoing and a fixed term fee at the same time.

ADVICE FEES

TYPE OF FEE	AMOUNT	HOW AND WHEN PAID
<p>Fixed Term Fee A percentage or flat dollar fixed term fee for services that your Financial Adviser provides in relation to advice about your account. The term cannot be more than 12 months.</p>	<p>To be agreed with your Financial Adviser, up to a maximum of 2% of your total Portfolio balance</p>	<p>Calculated daily and paid to your Financial Adviser either monthly, quarterly, half yearly or annually (depending on the frequency elected) in arrears, or on closure of your Portfolio, by debiting the fee from your cash balance, provided the Trustee’s requirements are met.</p>

For more information, please contact your Financial Adviser or the Client Support Centre by phoning 1300 168 905 or email clientsupport@platformpluswrap.com.au.

IMPORTANT INFORMATION

This notice is issued by Equity Trustees Superannuation Limited (ABN 50 055 641 757, AFSL 229 757, RSE License No. L0001458) in its capacity as the Trustee of Platformplus Super Wrap. Read more about Equity Trustees Superannuation Limited on their website eqt.com.au/superannuation.

This information is purely factual information and does not take into account your personal needs, financial circumstances or objectives. Before acting on this information, you should consult an authorised financial adviser to obtain financial advice that is tailored to suit your personal circumstances. Members should also read the Product Disclosure Statement and Target Market Determinations before making any investment decisions, which can be found by visiting platformpluswrap.com.au/product-information-and-guides/.

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