

Accepting a one-off adviser fee

This guide provides instructions on how to accept a one-off adviser fee.

When your adviser sets up a one-off advice fee, you will receive an email notifying you to log into your account and accept

Email sample:



Name: Rebecca Sherwell
User ID:

Reminder - Log in to PlatformplusWRAP to approve outstanding authorisation requests.

Hi Rebecca,

You have a pending authorisation awaiting your approval in the below portfolio.

Portfolio name:

- Rebecca Sherwell - Accumulation:

Pending authorisation:

- One Off Adviser Fee

To view and approve this authorisation, please log in to PlatformplusWRAP at <https://login.platformpluswrap.com.au>.

Pending authorisations are visible under the Administration menu.

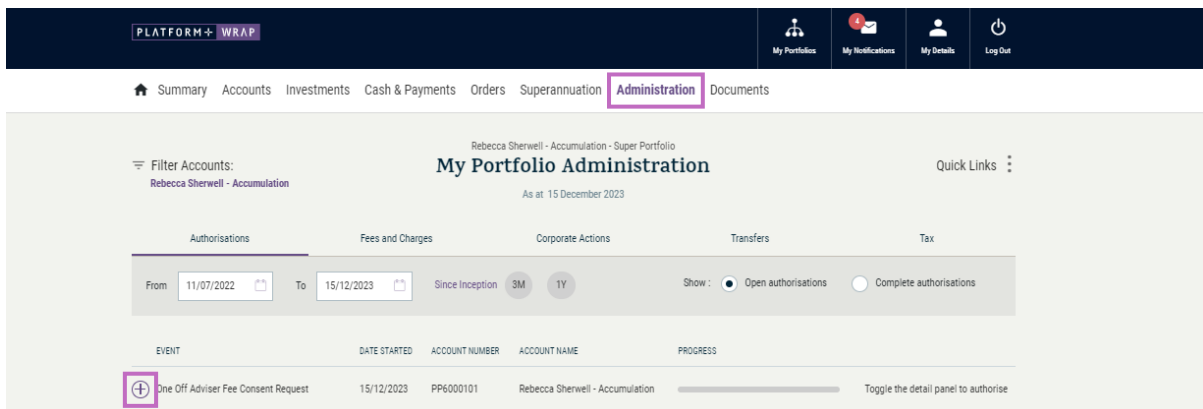
If you have any questions, contact us on 1300 168 905. Lines are open 8.30 a.m. - 7 p.m. AEDT from Monday to Friday (excluding national public holidays). You can also email us at clientsupport@platformpluswrap.com.au

PlatformplusWRAP

Level 2, Cnr Maroochydhore Road & Evans Street, Maroochydhore | QLD 4558
PO Box 1856, Sunshine Plaza | QLD 4558

<http://www.platformpluswrap.com.au/>

1. Once logged into your client portal, click on **Administration**, then the expand icon



2. Review the information

EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS
One Off Adviser Fee Consent Request	15/12/2023		Rebecca Sherwell - Accumulation	<div style="width: 100%;"></div>

Toggle the detail panel to authorise

Portfolio Name: Rebecca Sherwell - Accumulation - Super Portfolio

Please review the below one-off advice fees and click authorise to provide consent that you agree to the fees.

What is the amount of the one-off fee you will pay?

If you consent, you will pay the following one-off advice fee from your Account.

: SOA Account

FEE TYPE	NARRATION	AMOUNT (INCL. GST)
One Off Advice Fee	One Off Adviser Fee 15/12/2023	\$1.00

Why is Platformplus Super Wrap superannuation seeking your consent?

Platformplus Super Wrap superannuation is required by law to obtain your written consent before the fee for financial advice can be deducted from your Account and paid to Infocus Securities Australia Pty Ltd. If you are not happy with the amount or the services described below, you do not have to consent.

What services will Infocus Securities Australia Pty Ltd provide for the one-off advice fee you will pay?

Infocus Securities Australia Pty Ltd will provide one-off financial advice and will provide the following services, as documented in your Statement of Advice / Record of Advice dated 11 July 2022.

- Review of your account

How long does your consent last?

Your consent expires once the amount is deducted from your Account. This means Platformplus Super Wrap superannuation or your Adviser will have to ask for your consent again if Platformplus Super Wrap superannuation wants to deduct fees from your Account for further advice provided by Infocus Securities Australia Pty Ltd in the future.

How can you withdraw your consent?

You may withdraw your consent to the deduction of advice fees from your Account at any time by contacting the Platformplus Super Wrap superannuation fund at the contact details below.

A withdrawal of consent must occur before the amount has been deducted from your Account. The advice fee amount will be deducted once consent is received and when there is sufficient available cash to fund the payment.

Adviser Details

Financial Adviser Name	IWM Adviser	Licensee	Infocus Securities Australia Pty Ltd
Adviser Phone Number	07 54065000	AFSL	236523
Adviser Email	Rebecca.Sherwell@platformplus.com.au		

Superannuation Fund Details

Fund Name	Platformplus Super Wrap superannuation fund	Phone	1300 168 905
ABN	18 906 079 389	Email	clientsupport@platformpluswrap.com.au
RSE Registration Number	R1078770	Website	https://www.platformplus.com.au/

3. Scroll down and click Authorise

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Adviser Details

Financial Adviser Name	IWM Adviser	Licensee	Infocus Securities Australia Pty Ltd
Adviser Phone Number	07 54065000	AFSL	236523
Adviser Email	Rebecca.Sherwell@platformplus.com.au		

Superannuation Fund Details

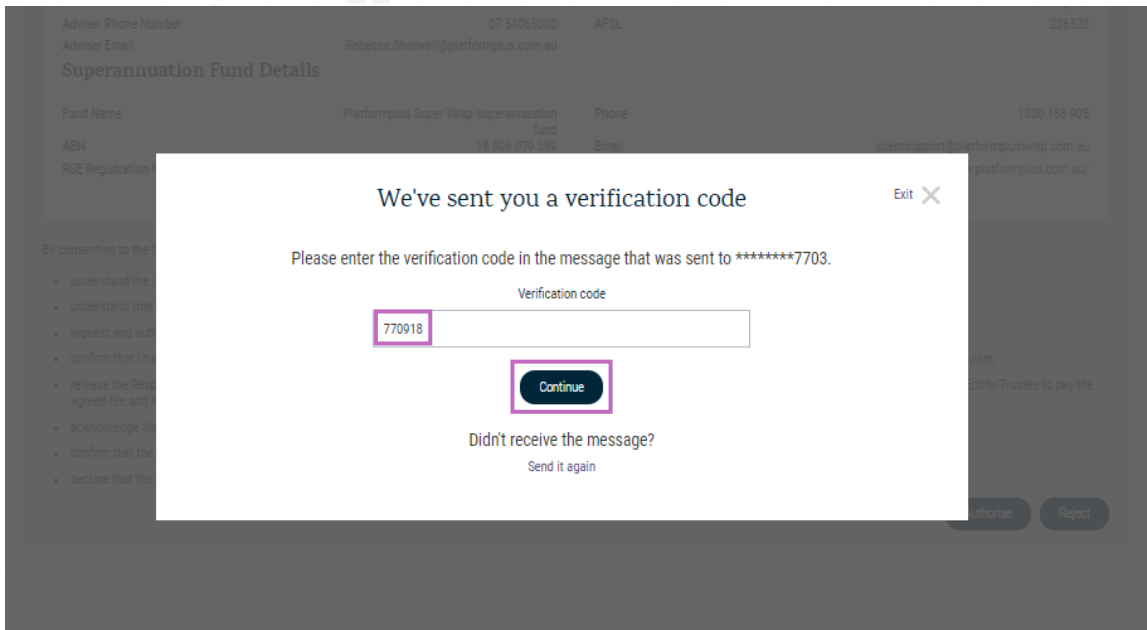
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RSE Registration Number	R1078770	Website	https://www.platformplus.com.au/

By consenting to the fees I:

- understand the information provided above;
- understand that where my Financial Adviser is part of an adviser dealer group, payment will be made to that dealer group and not the individual adviser;
- request and authorise the adviser fee(s) to be deducted from my Account(s) and to be paid to my Financial Adviser;
- confirm that I have chosen my Financial Adviser and that the Responsible Entity/Trustee is not responsible for the financial advice services to be provided by my Financial Adviser;
- release the Responsible Entity/Trustee from any claim relating to the financial advice services to be provided by my Financial Adviser, other than a claim for the Responsible Entity/Trustee to pay the agreed fee and to deduct it from my Account;
- acknowledge the Responsible Entity/Trustee has discretion to reject the payment of Advice Fees;
- confirm that the Advice Fee listed in this form reflects a fee amount that has been agreed with my Financial Adviser; and
- declare that the Advice Fee to be paid complies with the sole purpose test.

Authorise
Reject

4. You will then be prompted to enter a pin which will be sent to your mobile number
5. Once you have entered the pin, the **Continue** button will activate for you to click



6. Once it has been successfully submitted, you will receive the following message



Should you have any questions or require any additional information in relation to this guide, please contact your financial adviser or the PlatformplusWRAP Client Support Centre on 1300 168 905 or ClientSupport@PlatformplusWrap.com.au.