

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 <u>clientsupport@platformpluswrap.com.au</u>

PlatformplusWRAP

Level 2, Cnr Maroochydore Road & Evans Street, Maroochydore | 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

PLATFORM+ WRAP					My Portfolios	My Notifications	My Details	ڻ Log Dut
★ Summary Accounts Investments Cash & Payments Orders Superannuation Administration Documents								
Filter Accounts: Rebecca Sherwell - Accumulation - Super Portfolio My Portfolio Administration As at 15 December 2023						Quick I	Links 🚦	
Authorisations	Fees and Charge	s	Corporate Actions	Transf	ers		Тах	
From 11/07/2022 👛 To	15/12/2023	Since Inception	3M 1Y	Show : Opt	en authorisations	Comple	te authorisation	15
EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS				

1 V1.0 December 2023



INVESTMENT AND SUPER

2. Review the information

	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROC	RESS		
ne Off Adviser Fee Consent Request	15/12/2023		Rebecca Sherw Accumulation	ell -		Toggle t	the detail panel to aut
Portfolio Name: Re	ebecca Sher	well - Accu	mulation	- Super P	ortfolio		
Please review the below one-off advir	ce fees and click author	ise to provide consen	it that you agree to	the fees.			
What is the amount of the	one-off fee you w	ill pay?					
If you consent, you will pay the follow	ving one-off advice fee f	rom your Account.					
: SOA A	ccount						
	NAR	ATION					AMOUNT (INCL. 651)
One Off Advice Fee	One	Off Adviser Fee 15/12	2/2023				\$1.00
Why is Platformplus Super	Wrap superannu	ation seeking vo	ur consent?				
Platformplus Super Wrap superannua Australia Pty Ltd. If you are not happ	ation is required by law t	o obtain your written	consent before the	e fee for financial ad ave to consent.	vice can be deducted from	your Account and paid to Info	ocus Securities
What services will Infocus §	Securities Australi	ia Ptv Ltd provid	le for the one	-off advice fee	ou will pay?		
Infocus Securities Australia Dty I to u	vill provide one-off finan	cial advice and will pr	rovide the followin		1 V		and 11, July 2022
missua accunitica Auatralid Pity Litu V			IOVIDE LITE IONOWIN	g services, as docun	iented in your Statement o	t Advice / Record of Advice d	ated IT July 2022.
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3. Scroll down and click Authorise

How long does your consent la	st?		
Your consent expires once the amount is Super Wrap superannuation wants to ded	deducted from your Account. This means Platformplus Su uct fees from your Account for further advice provided by	iper Wrap superannuatio Infocus Securities Austr	n or your Adviser will have to ask for your consent again if Platformplus alia Pty Ltd in the future.
How can you withdraw your co	nsent?		
You may withdraw your consent to the de	duction of advice fees from your Account at any time by c	ontacting the Platformpl	us Super Wrap superannuation fund at the contact details below.
A withdrawal of consent must occur befo cash to fund the payment.	re the amount has been deducted from your Account. The	advice fee amount will b	e deducted once consent is received and when there is sufficient available
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 De	ails		
Fund Name	Platformplus Super Wrap superannuation	Phone	1300 168 905
ABN	18 906 079 389	Email	clientsupport@platformpluswrap.com.au
RSE Registration Number	R1078770	Website	https://www.platformplus.com.au/
By consenting to the fees I:			
understand the information provided ab	ove;		
• understand that where my Financial Adv	iser is part of an adviser dealer group, payment will be ma	ade to that dealer group a	and not the individual adviser;
• request and authorise the adviser fee(s)	to be deducted from my Account(s) and to paid to my Fin	ancial Adviser;	
· confirm that I have chosen my Financial	Adviser and that the Responsible Entity/Trustee is not res	sponsible for the financia	al advice services to be provided by my Financial Adviser;
 release the Responsible Entity/Trustee is agreed fee and to deduct it from my Acc 	rom any claim relating to the financial advice services to b count;	be provided by my Financ	al Adviser, other than a claim for the Responsible Entity/Trustee to pay the
acknowledge the Responsible Entity/Tru	ustee 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	

Authorise Reject

PLATFORMPLUSWRAP - USER GUIDE - ACCEPTING A ONE-OFF ADVISER FEE

PLATFORM + WRAP

You will then be prompted to enter a pin which will be sent to your mobile number
 Once you have entered the pin, the <u>Continue</u> button will activate for you to click

Once you ha	ave entered	the pin, the	e <u>Continue</u>	button wi	ill activate	for you	to clio

ABN	18 906 079 389	Email	clientsupport@pla	
RSC Rejistration 1	We've sent you a v	erification code	Exit 🗙	
By consenting to the Please	e enter the verification code in the me	essage that was sent to ********77	D3.	
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acknowledge the confirm that the	Didn't receive th	e message?		
 declare that the 	Send it a	gain		

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

➡ Filter Accounts: Rebecca Sherwell - Accumulation	My Po	Rebecca Sherwell - Accumulation - Super Portfolio My Portfolio Administration As at 15 December 2023		
Authorisations	Fees and Charges	Corporate Actions	Transfers	Tax
Your authorisation was succe	essful.			
From 11/07/2022	15/12/2023 Cince Inception	on 3M 1Y	Show : Open authorisations	O Complete authorisations

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 <u>ClientSupport@PlatformplusWrap.com.au</u>.