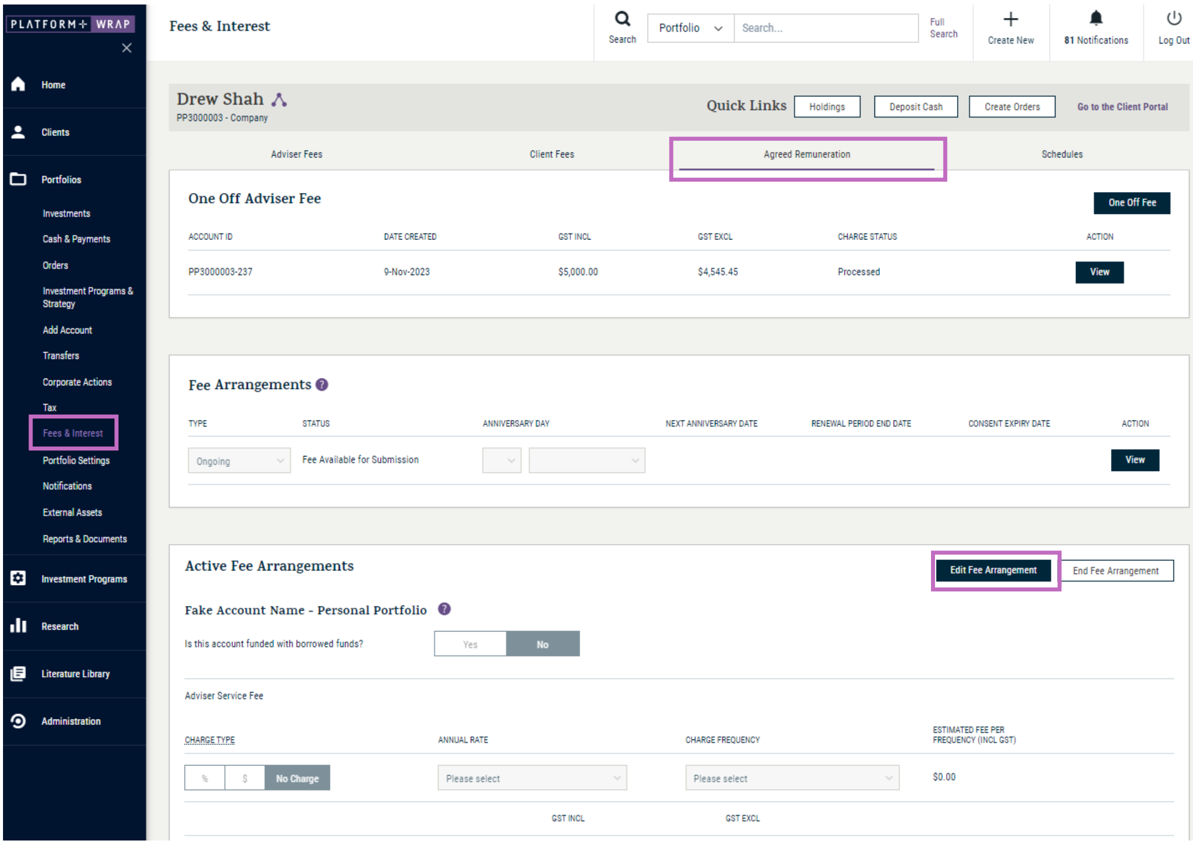
Adding a fixed term agreement to an existing client (no existing fee)

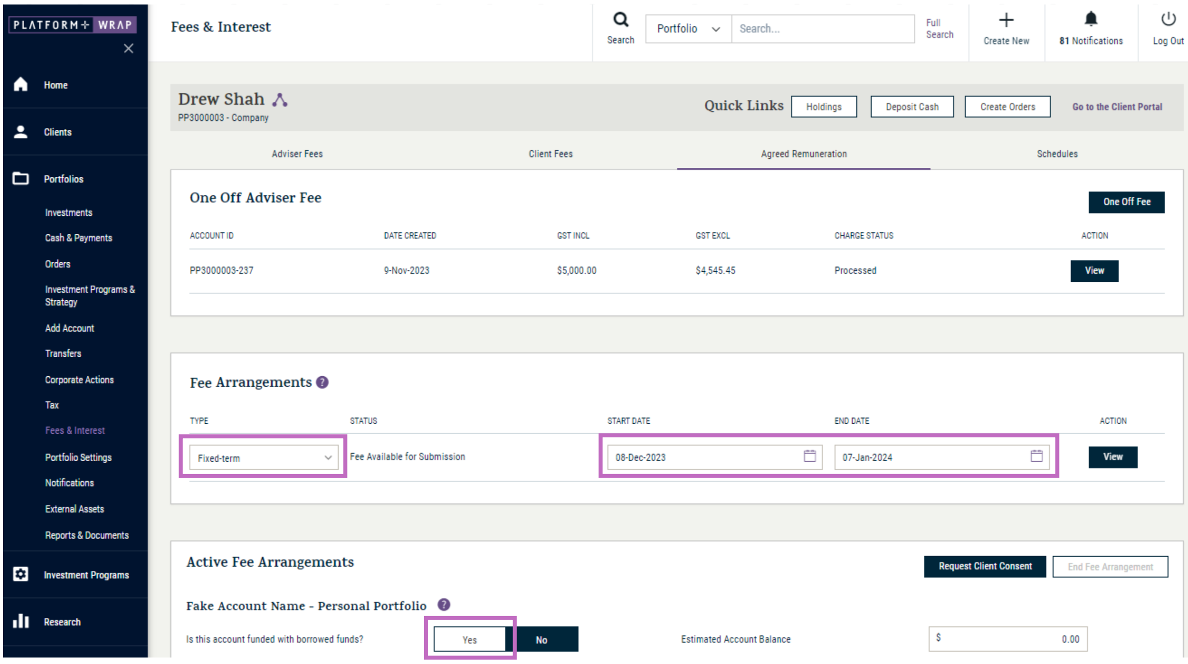
Adviser guide only.

This guide provides instructions on how add a Fixed term to an existing client that has no existing fee.

1. Once in the client's portfolio, click **Fees & Interest**, **Agreed Remuneration**
2. Click **Edit Fee Arrangement**



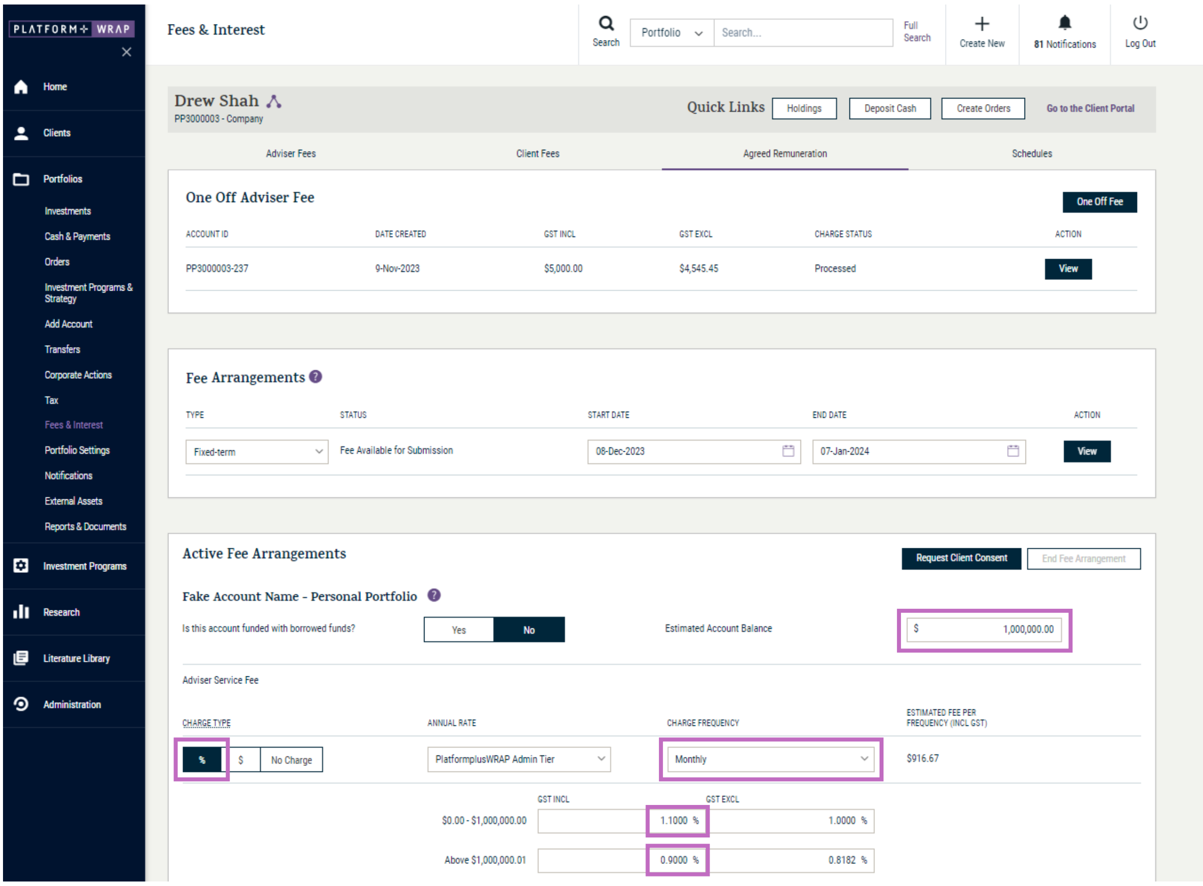
3. In the **Fee Arrangements** box under **Type**, select **Fixed-term** via the drop-down box
4. Alter the start and end dates
5. If the account is funded with borrow funds, click **Yes**
   Note: the platforms default on this question is **No**



6. From here, you have two options: **% based** or **flat fee**

Option 1: % based fee

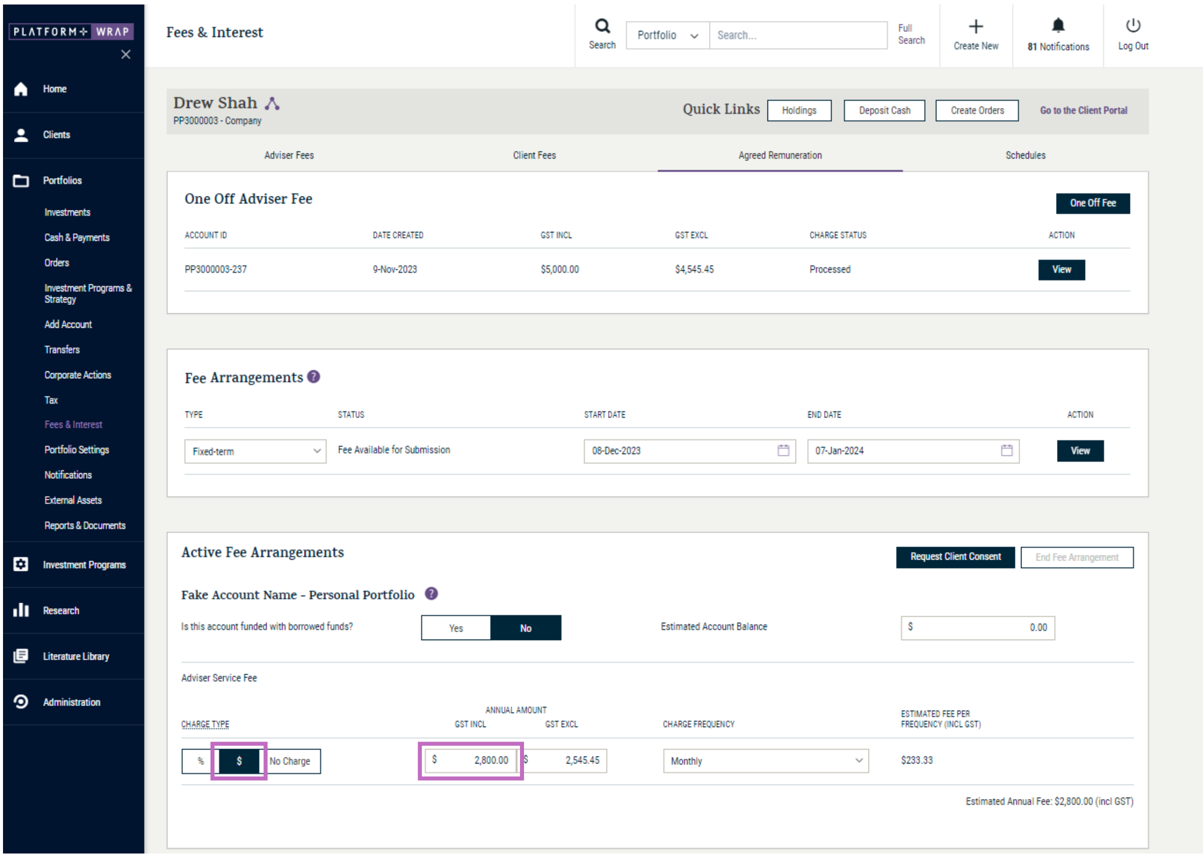
1. Under **Charge Type**, click %
2. Enter the estimated account balance. This field only becomes active once a percentage fee has been selected
3. Using the drop-down box under **Annual Rate**, select the fee tier
4. Enter the % values required for each tier
5. Select the charge frequency
   Note: the charge frequency refers to the frequency when the fee will be deducted from the client's portfolio and paid to your office



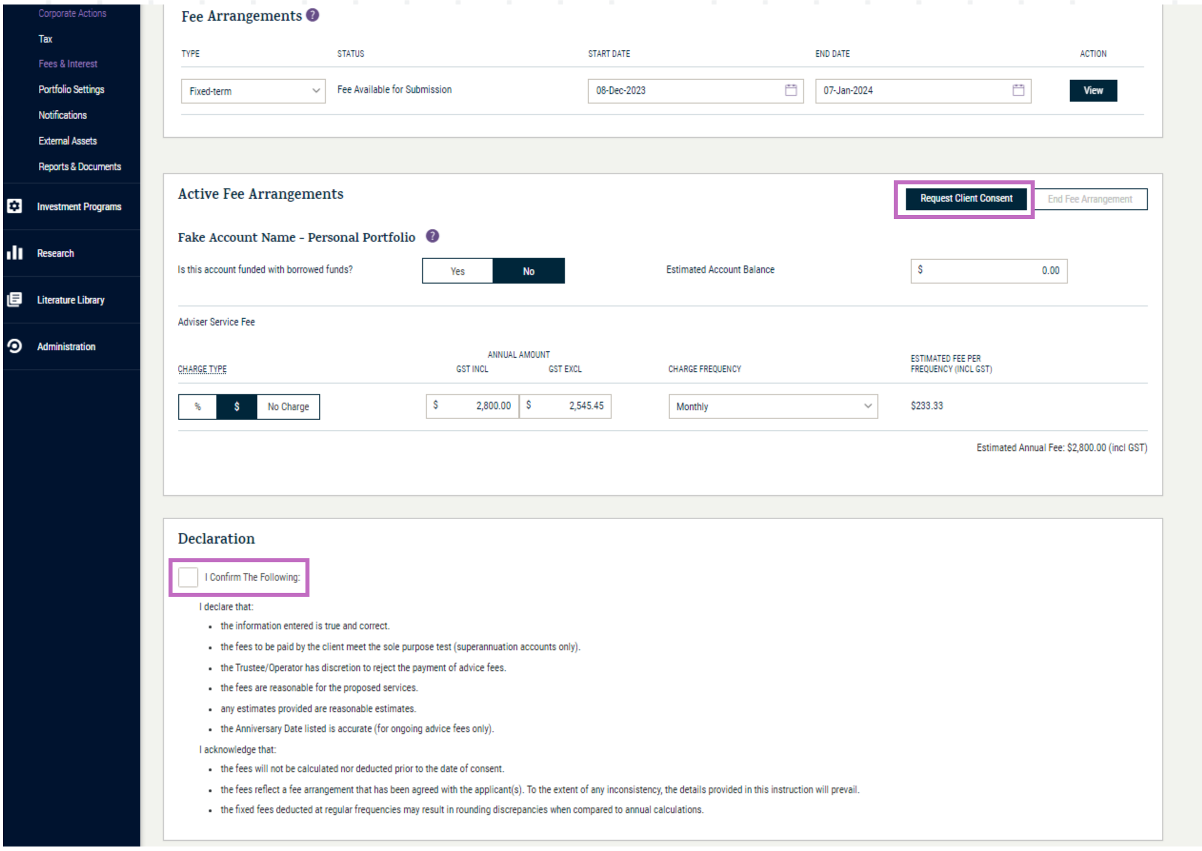
Option 2: Flat based fee

1. Under **Charge Type**, click $
2. Enter the annual amount of the fixed term fee, even if the term is less than 12 months
3. Select the **Charge Frequency.**
   Note: the charge frequency refers to the frequency when the fee will be deducted from the client's portfolio and paid to your office.
4. Confirm the **Estimate Fee Per Frequency** is correct

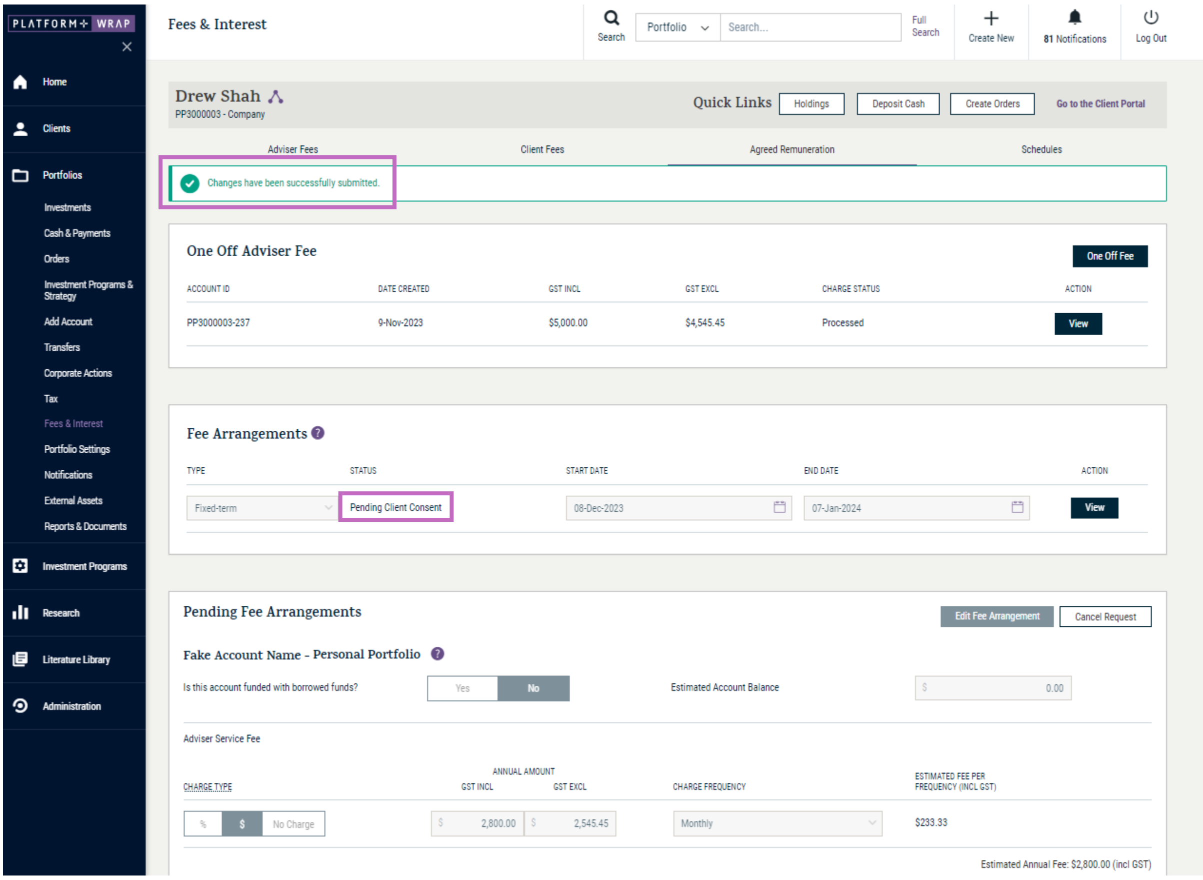
Note: the **Estimated Account Balance** field only becomes active for percentage-based fees.



5. Scroll down to the declaration box and tick the check box
6. Click the **Request Client Consent** button



7. Once successfully submitted you will receive the following message and the status in the **Fee Arrangements** screen will be updated to **Pending Client Consent**



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.