Client Acceptance: Digital Fee Arrangement

Investor guide only.

This guide provides instructions on how to accept an adviser fee via your client portal.

When a digital fee arrangement has been submitted for your approval, you will receive the following email.

You have a pending authorisation on Platform

PW noreply@platformpluswrap.com.au
To Rebecca Sherwell

Name: Jason Flex
User ID: JFlex476

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

Hi Jason,

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

Portfolio name:

- Jason Flex:

Pending authorisation:

- Advice Fee Consent

To view and approve this authorisation, please log in to PlatformplusWRAP at https://loginplatformplusofsu73.fnz.com.

Pending authorisations are visible under the Administration menu.

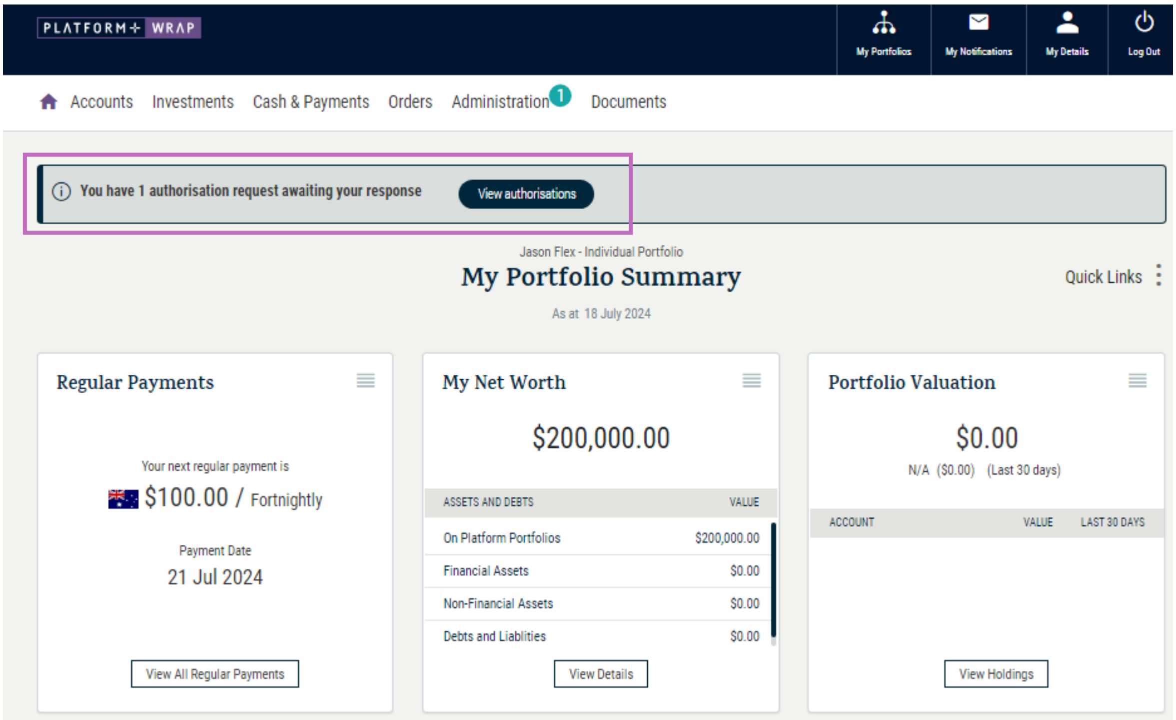
If you have any questions, contact us on 1300 168 905. Lines are open 8.30 a.m. - 7 p.m. AEST from Monday to Friday (excluding national public holidays). You can also email us at clientsupport@platformpluswrap.com.au

PlatformplusWRAP

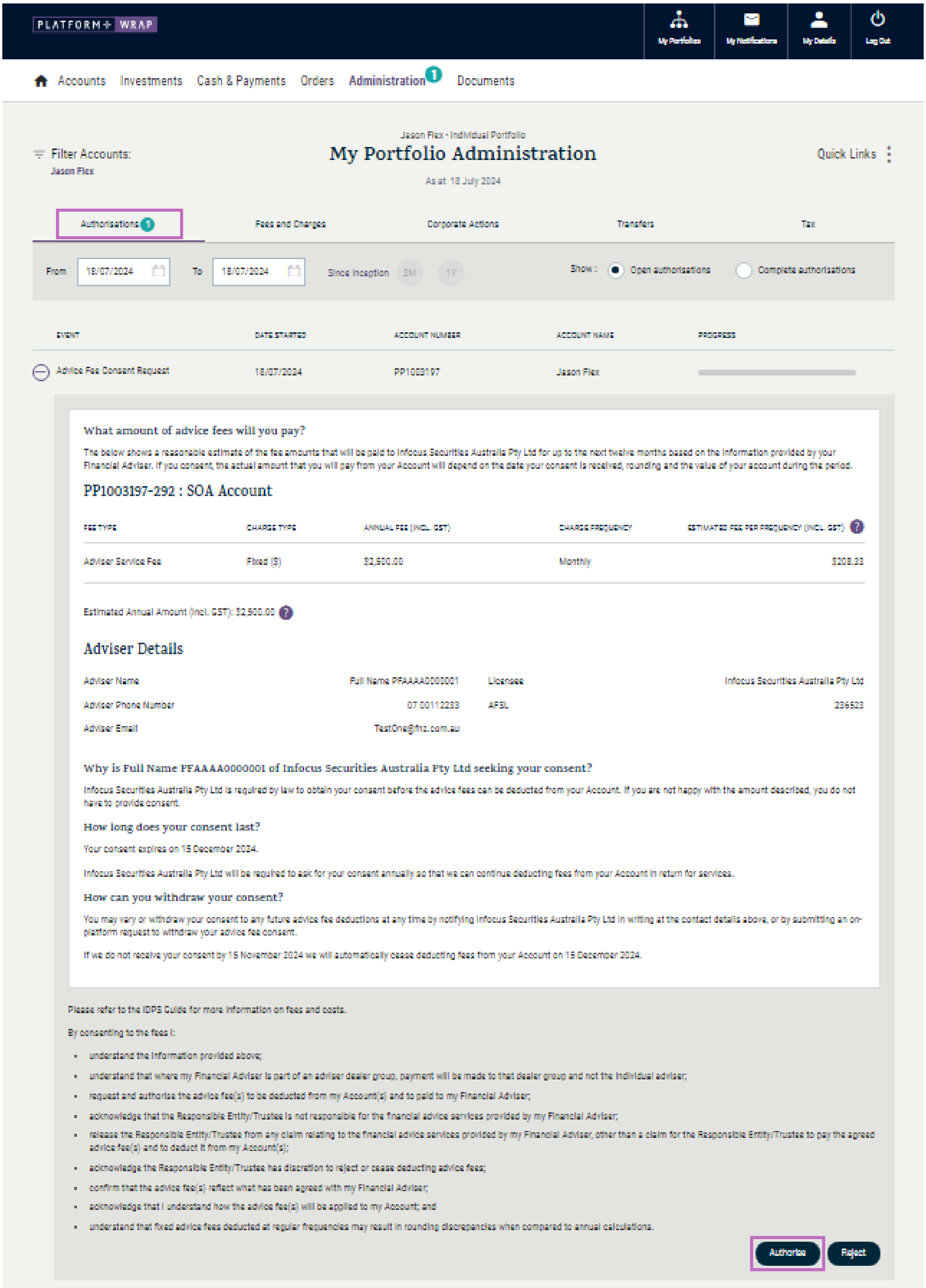
Level 2, Cnr Maroochydore Road & Evans Street, **Maroochydore** | QLD 4558
PO Box 1856, **Sunshine Plaza** | QLD 4558

Computer View

1. Once you have logged into your client portal, you will see the following message. Click on the **View authorisations** button

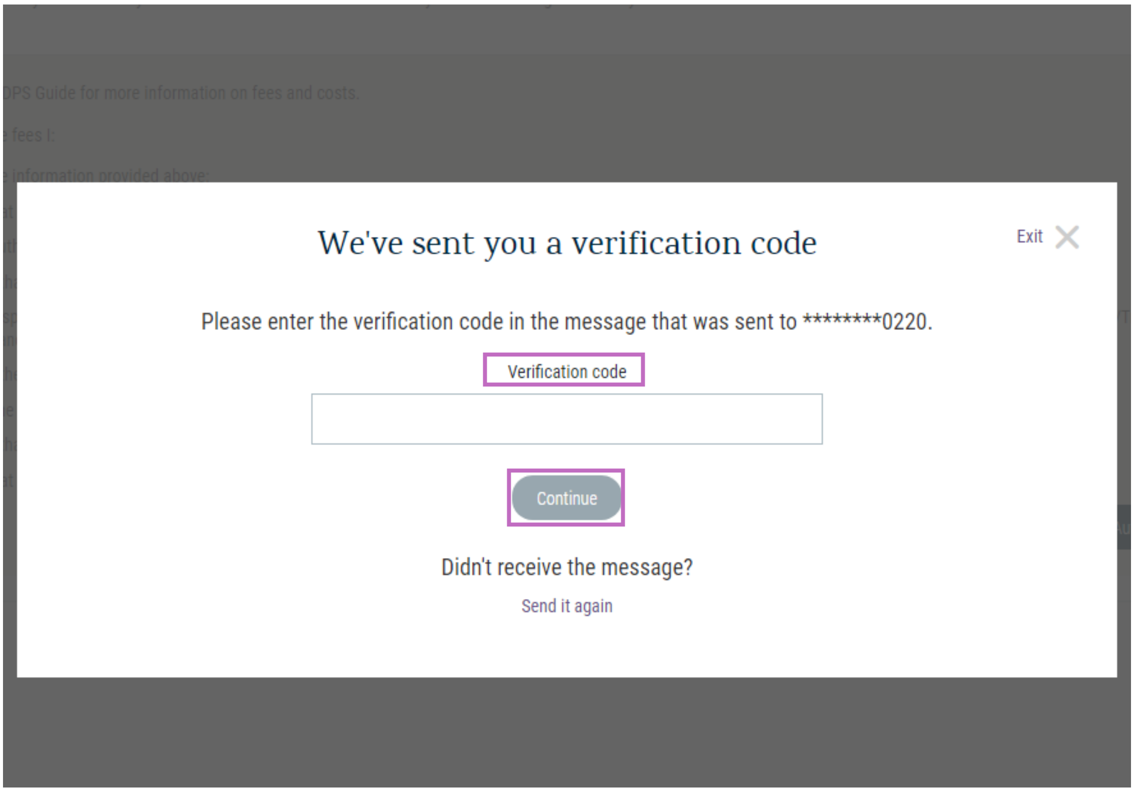


2. Under **Event** you will see the **Advice Fee Consent Request**. Review the information and click **Authorise**



3. A pop-up box will then appear for you to enter a verification code. This code will be sent to your mobile

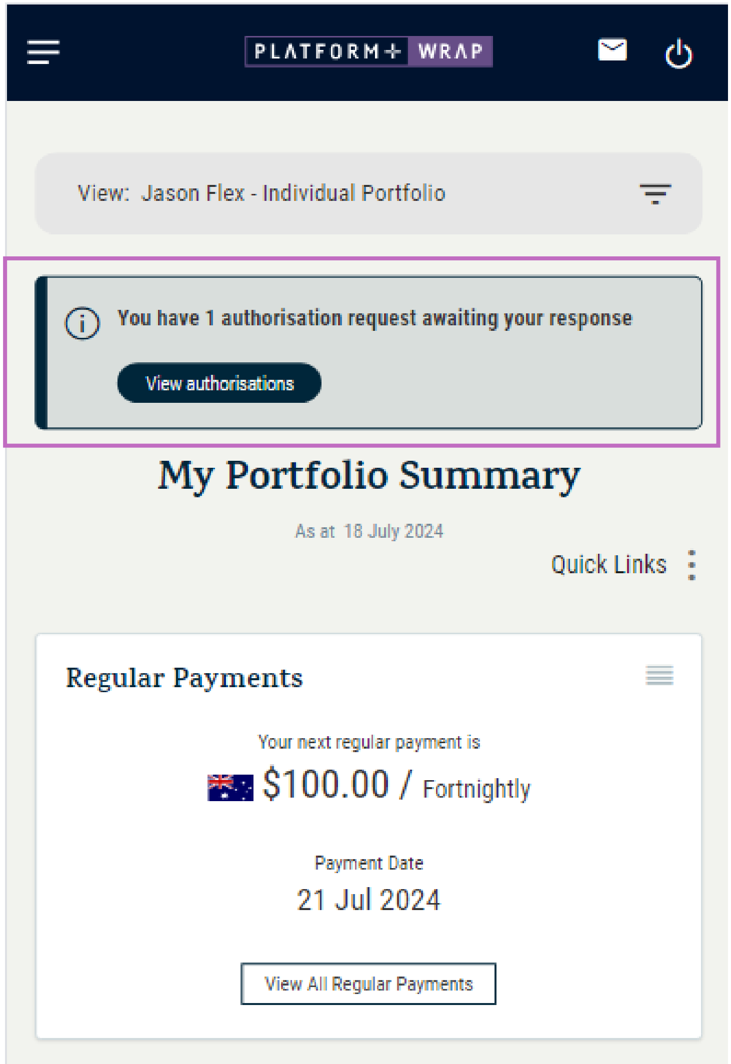
4. Enter code and click **Continue**



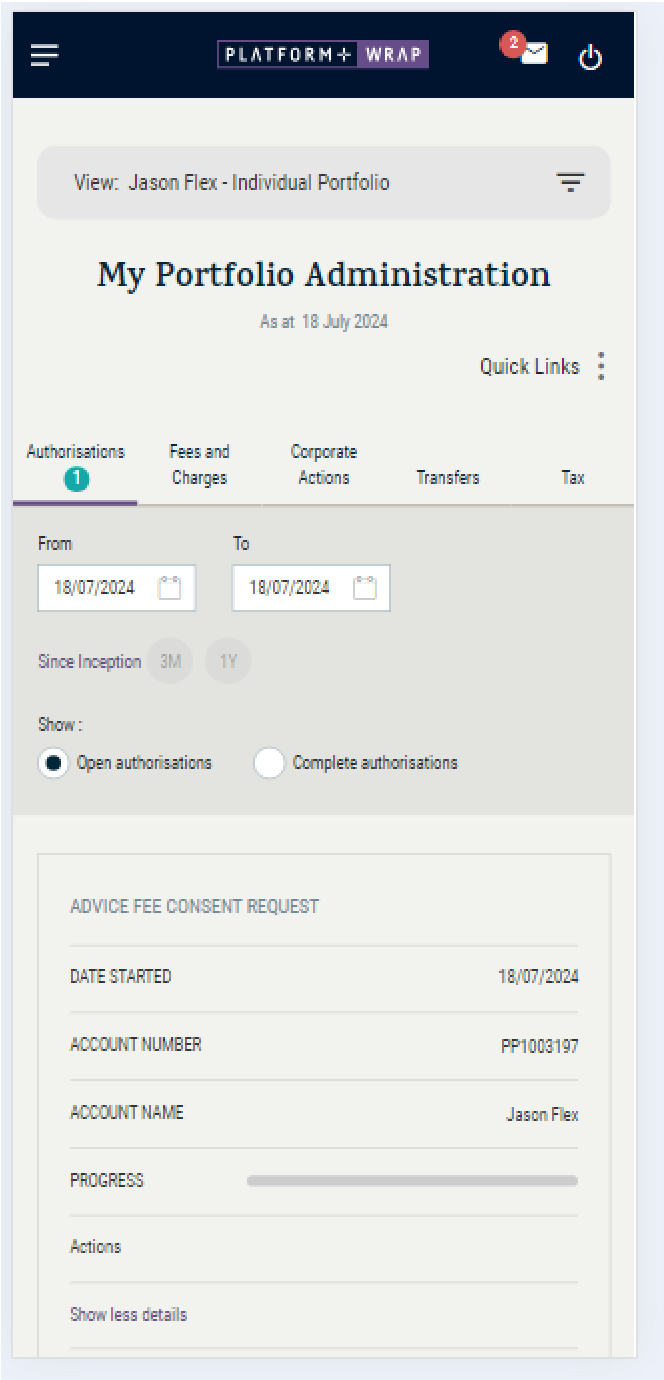
5. When successfully authorised, you will receive the following message

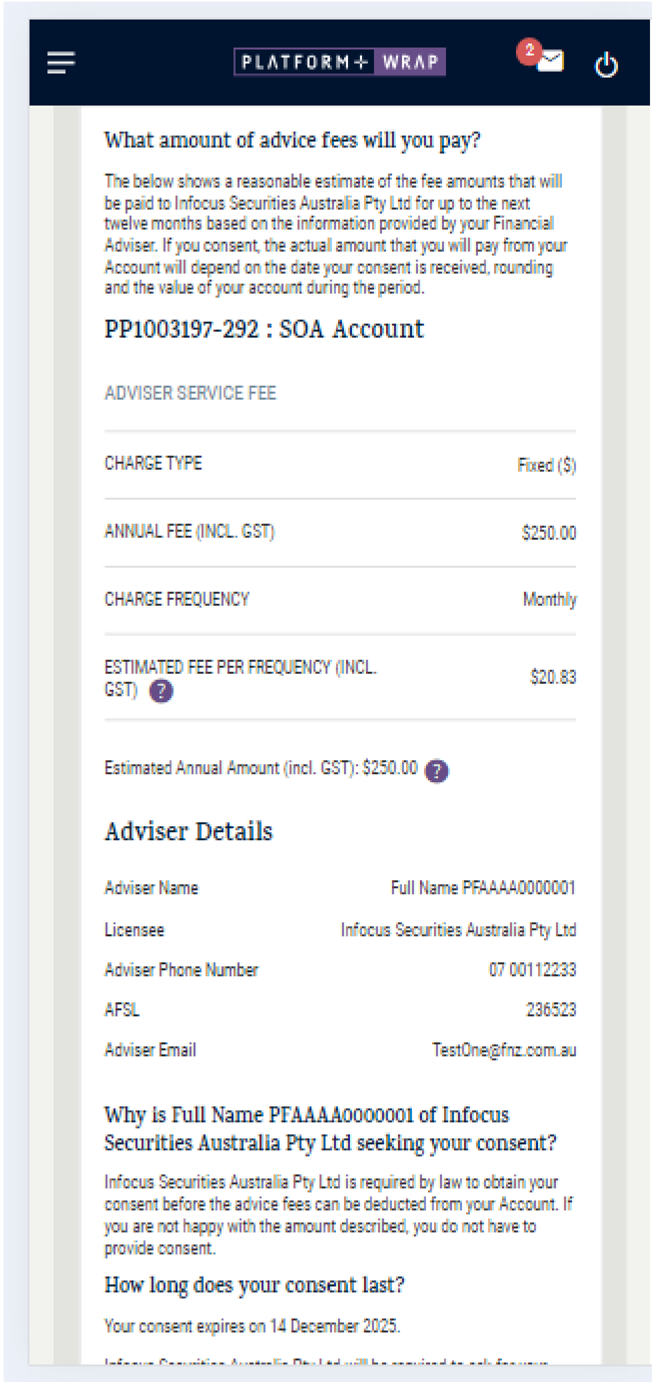
Phone View

1. Once you have logged into your client portal, you will see the following message. Click on the **View authorisations** button

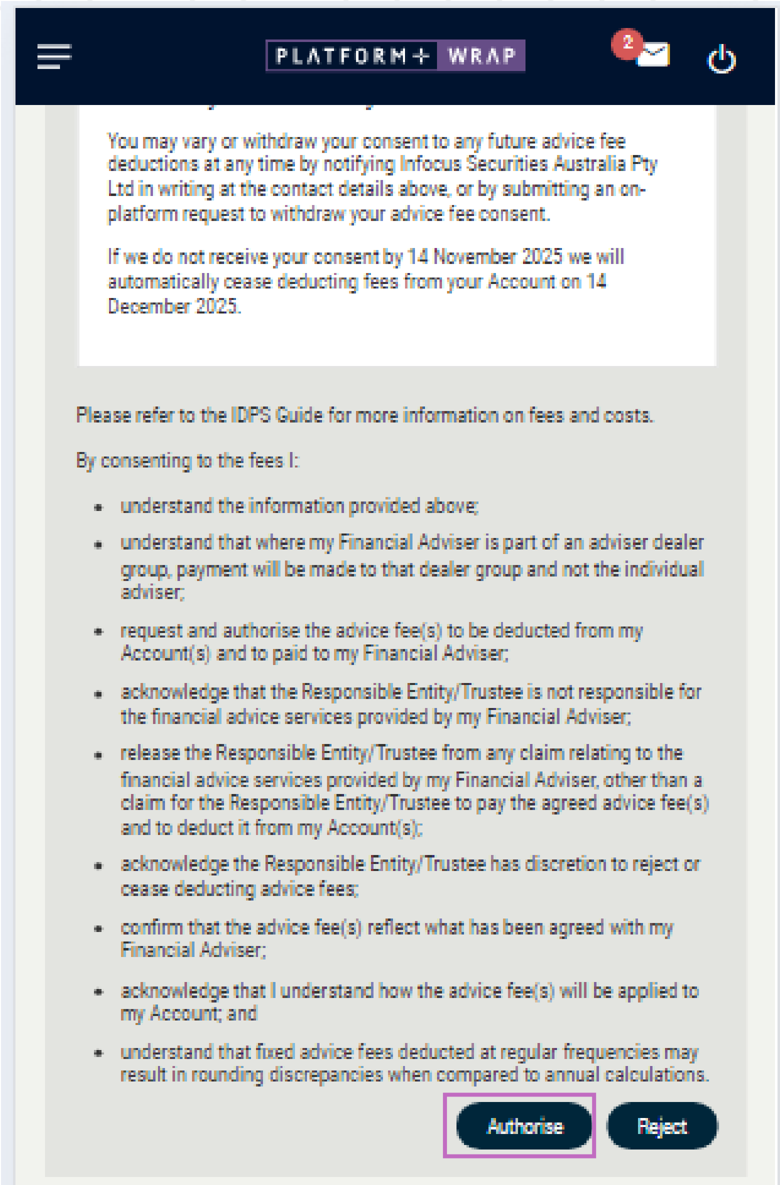


2. Under **Event** you will see the Advice Fee Consent Request. Scroll down to review the information

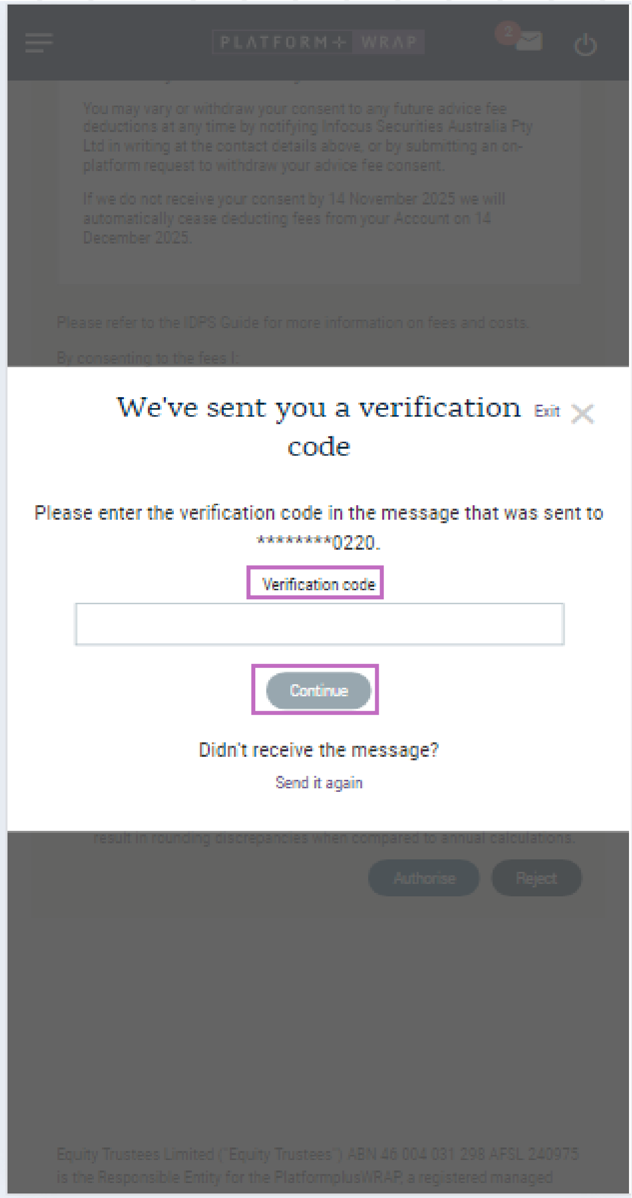




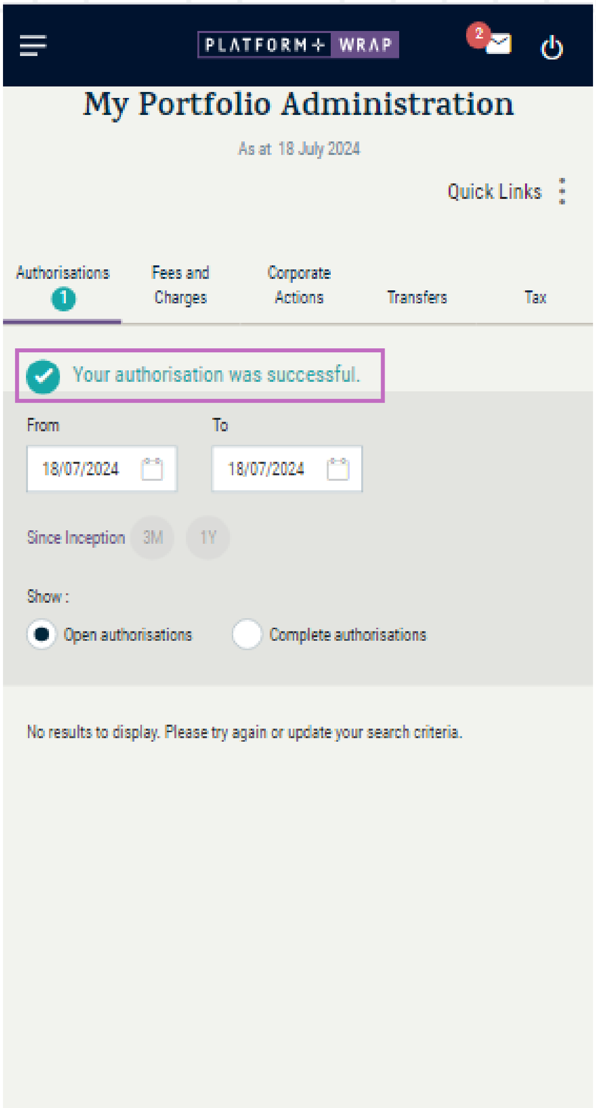
3. Click **Authorise**



4. A pop-up box will then appear for you to enter a verification code. This code will be sent to your mobile



5. When successfully authorised, you will receive the following message



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@platformpluswrap.com.au.