Getting Started with PlatformplusWRAP

Your guide to navigating PlatformplusWRAP

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For more information visit:
www.platformpluswrap.com.au/support

Welcome

Thank you for choosing PlatformplusWRAP! This guide is here to support you as you transition to using the platform.

Contacting Platformplus WRAP:

Key Contacts

PlatformplusWRAP Adviser Support

Our Implementation Team, Rebecca and Matthew, are here to assist and support you with implementation, general use of the platform and its functionality.

support@platformpluswrap.com.au

1300 191 952

PlatformplusWRAP Client Support

Our dedicated call centre team is ready to assist you with any portfolio inquiries, including rollover follow-ups and portfolio specific questions.

clientsupport@platformpluswrap.com.au

1300 161 905

Online Services

PlatformplusWRAP online services is how you will securely and easily submit work items, raise queries and interact with the platform Administrator (FNZ). This support query functionality is available through the WRAP Adviser Portal.

Service Requests: A request for something to be provided/updated/amended on a portfolio that cannot be completed online.

Incident Log: To be used should you experience a problem with the platform or specific portfolio.

Service Request & Issue Log: For a detailed guide and understanding of service request and issue log, please refer to our technical guide:

CLICK HERE for the Service Request & Issue Log Technical Guide

Getting Started:

Cash Management

Understanding cash management on PlatformplusWRAP is essential. For detailed guidance and understanding, please refer to our technical guide:

CLICK HERE for the Cash Management Technical Guide

Application Process

Initial applications can be online or a hybrid of online and paper based.

While PlatformplusWRAP is primarily online, there are options for paper-based forms for the following processes:

- Application
- Fee consent (once active)

Required Forms for Superannuation Portfolios	
Accumulation	• Rollover Form • Nomination of Beneficiary Form • Employee Super Fund Nomination Form
Pension	• Rollover Form - if funded by external funds • Pension Payment Form - with bank statement • Nomination of Beneficiary Form

Note: These forms are submitted via the Submit document functionality which creates a Service Request, allowing you to track progress and provide additional information as required.

For PlatformplusAMS users, you have the added efficiency benefit of these forms pre-filling with client data.

CLICK HERE to view a short video of on an overview of this functionality

Blank forms are available in the Literature Library accessible via your PlatformplusWRAP Adviser Portal.

PlatformplusAMS Integration

The integration between PlatformplusAMS and PlatformplusWRAP tools are designed to:

- Reuse data to minimise the time spent re-keying basic client information.
- Eliminate simple data transposition errors.
- Enhance overall efficiency and experience when implementing advice.

For further information, please refer to the Integration Guide HERE

Before using any of these integration features, it is critical that you have verified the integrity and accuracy of your PlatformplusAMS data.

When using the Magic Button, listed below are data points we highly recommended that you double-check:
- Full Name
- Date of Birth
- Residential Address
- Mobile Phone Number
- Email Address
- Tax File Number (TFN)

Pro Tip: To ensure direct debits as part of the initial application you will need to ensure you include bank account details.

User Guides

CLICK HERE to view user guides on our retail site

These guides are organised into categories to help you and your clients easily navigate to what you are looking for:

- **For Advisers:** Resources tailored for financial advisers, including tools and strategies for implementation.
- **For Investors:** Information designed for investors to navigate and utilise the platform effectively.

Feel free to explore the guides for step-by-step instructions, FAQs, and tips to optimise your experience.

Important Cut-Off Times

Trading Timeframes (Victoria Time)	• Manually Places Trades: **9:45am** • Invest Excess Cash Trades: **9:00am** • Term Deposit Trades: **12:00pm**
Settlement Timeframes	• Listed Securities (including ETFs): **2-3 business days** • Managed Funds_ **5-15 business days** • SMA: **5-10 business days** • Term Deposit Purchases: **2-3 business days** • Term Deposit Maturities: **2-3 business days**

Should you have any questions or require any additional information in relation to this guide, please contact the PlatformplusWRAP Support Team on:

support@platformpluswrap.com.au

1300 191 952