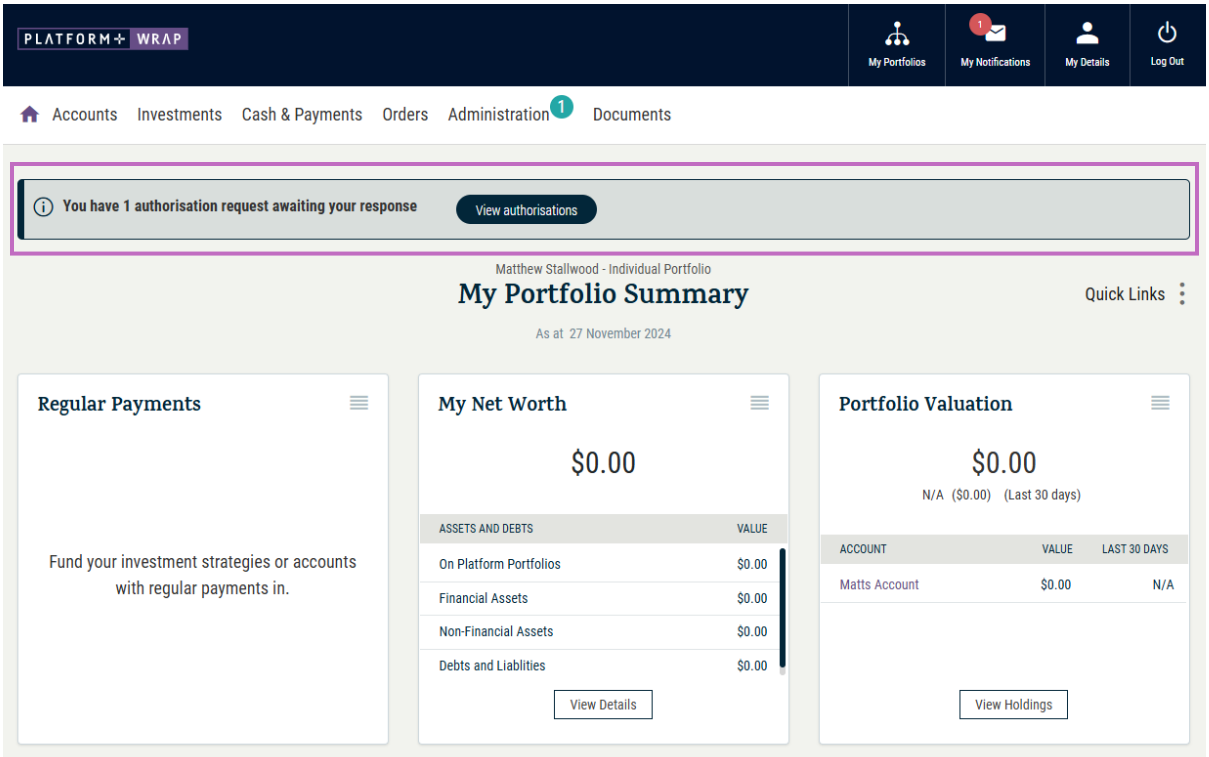
Accepting an Ongoing Fee Renewal

Client guide only.

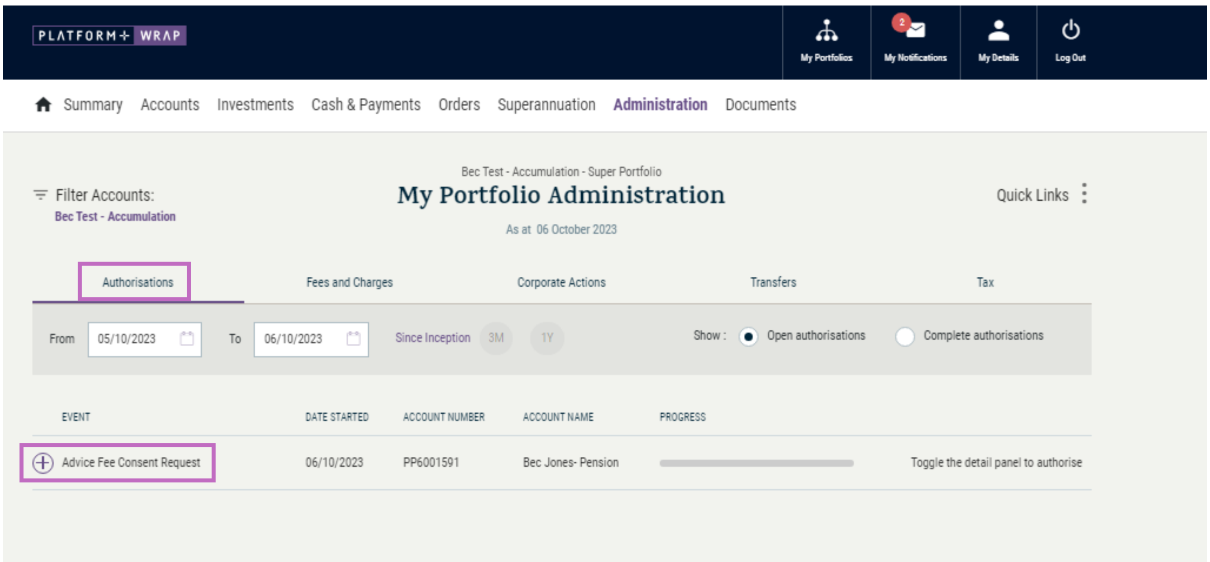
This guide provides instructions on how to accept an ongoing fee renewal agreement.

<u>Web View:</u>

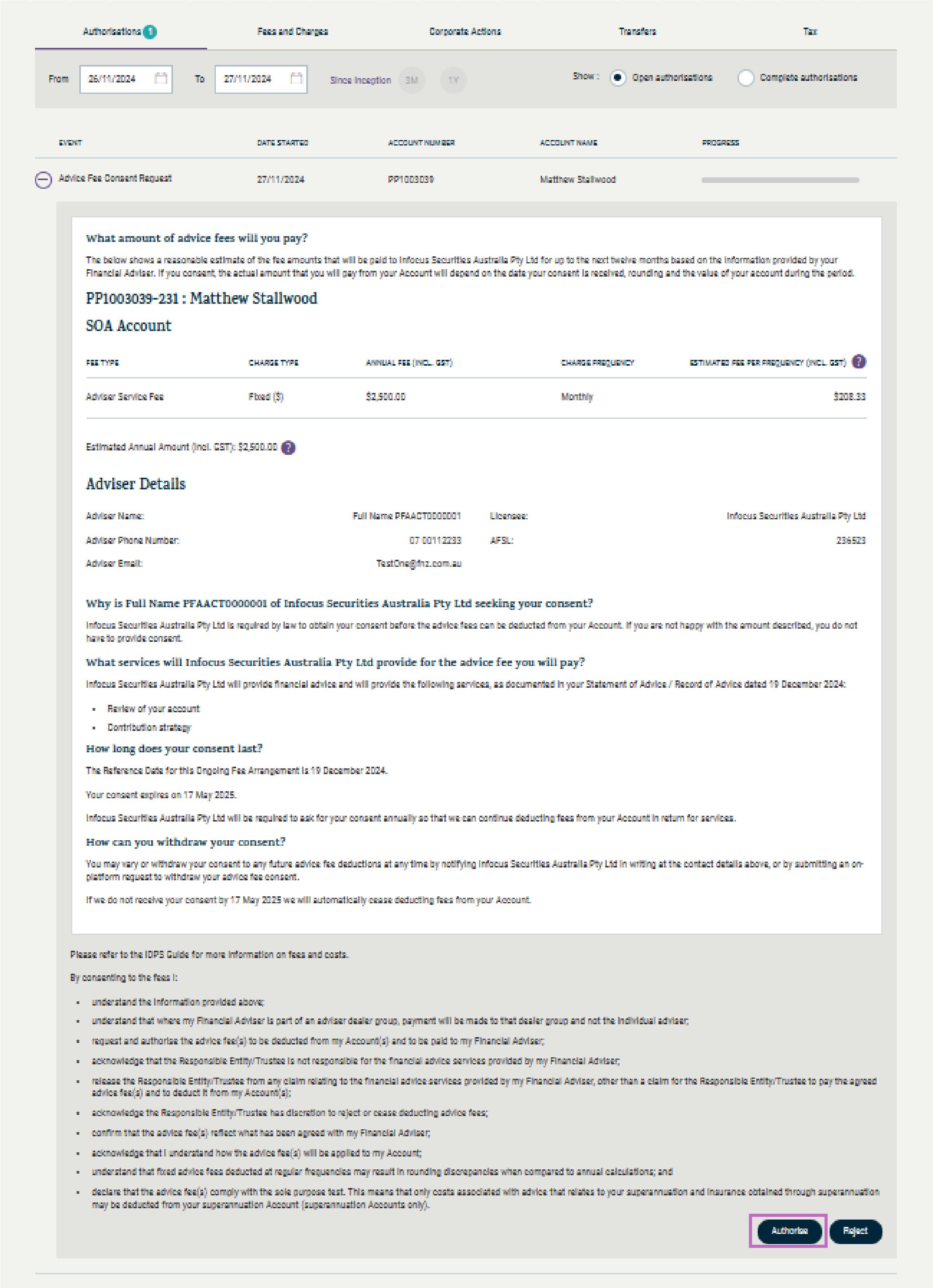
1. Once logged into your portal, click **<u>View Authorisation</u>** within the banner



2. Click on **<u>Authorisations</u>** and expand the **<u>Event</u>**



3. Review the information and click **Authorise**



Authorisations 1 | Fees and Charges | Corporate Actions | Transfers | Tax

From 26/11/2024 To 27/11/2024 Since Inception 3M 1Y Show : Open authorisations Complete authorisations

EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS
Advice Fee Consent Request	27/11/2024	PP1003039	Matthew Stallwood	

What amount of advice fees will you pay?

The below shows a reasonable estimate of the fee amounts that will be paid to Infocus Securities Australia Pty Ltd for up to the next twelve months based on the information provided by your Financial Adviser. If you consent, the actual amount that you will pay from your Account will depend on the date your consent is received, rounding and the value of your account during the period.

PP1003039-231 : Matthew Stallwood

SOA Account

FEE TYPE	CHARGE TYPE	ANNUAL FEE (INCL. GST)	CHARGE FREQUENCY	ESTIMATED FEE PER FREQUENCY (INCL. GST)
Adviser Service Fee	Fixed ($)	$2,500.00	Monthly	$208.33

Estimated Annual Amount (Incl. GST): $2,500.00

Adviser Details

Adviser Name:	Full Name PFAACT0000001	Licensee:	Infocus Securities Australia Pty Ltd
Adviser Phone Number:	07 00112233	AFSL:	236523
Adviser Email:	TestOne@fnz.com.au		

Why is Full Name PFAACT0000001 of Infocus Securities Australia Pty Ltd seeking your consent?

Infocus Securities Australia Pty Ltd is required by law to obtain your consent before the advice fees can be deducted from your Account. If you are not happy with the amount described, you do not have to provide consent.

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

Infocus Securities Australia Pty Ltd will provide financial advice and will provide the following services, as documented in your Statement of Advice / Record of Advice dated 19 December 2024:

- Review of your account
- Contribution strategy

How long does your consent last?

The Reference Date for this Ongoing Fee Arrangement is 19 December 2024.

Your consent expires on 17 May 2025.

Infocus Securities Australia Pty Ltd will be required to ask for your consent annually so that we can continue deducting fees from your Account in return for services.

How can you withdraw your consent?

You may vary or withdraw your consent to any future advice fee deductions at any time by notifying Infocus Securities Australia Pty Ltd in writing at the contact details above, or by submitting an on-platform request to withdraw your advice fee consent.

If we do not receive your consent by 17 May 2025 we will automatically cease deducting fees from your Account.

Please refer to the IDPS Guide for more information on fees and costs.

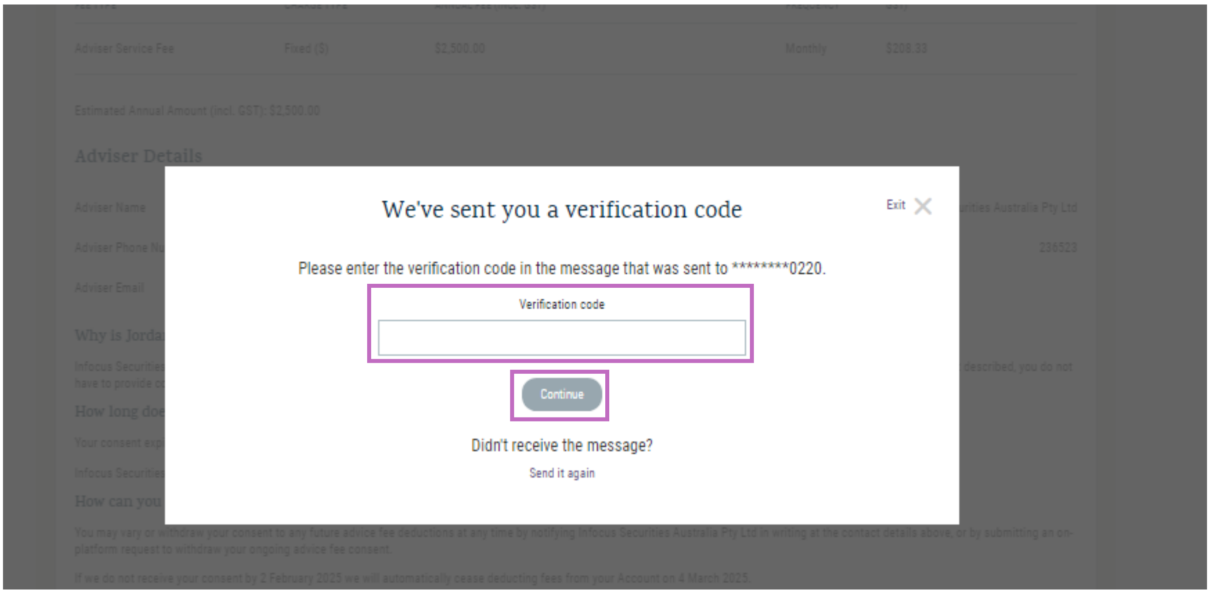
By consenting to the fees I:

- 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 advice fee(s) to be deducted from my Account(s) and to be paid to my Financial Adviser;
- acknowledge that the Responsible Entity/Trustee is not responsible for the financial advice services provided by my Financial Adviser;
- release the Responsible Entity/Trustee from any claim relating to the financial advice services provided by my Financial Adviser, other than a claim for the Responsible Entity/Trustee to pay the agreed advice fee(s) and to deduct it from my Account(s);
- acknowledge the Responsible Entity/Trustee has discretion to reject or cease deducting advice fees;
- confirm that the advice fee(s) reflect what has been agreed with my Financial Adviser;
- acknowledge that I understand how the advice fee(s) will be applied to my Account;
- understand that fixed advice fees deducted at regular frequencies may result in rounding discrepancies when compared to annual calculations; and
- declare that the advice fee(s) comply with the sole purpose test. This means that only costs associated with advice that relates to your superannuation and insurance obtained through superannuation may be deducted from your superannuation Account (superannuation Accounts only).

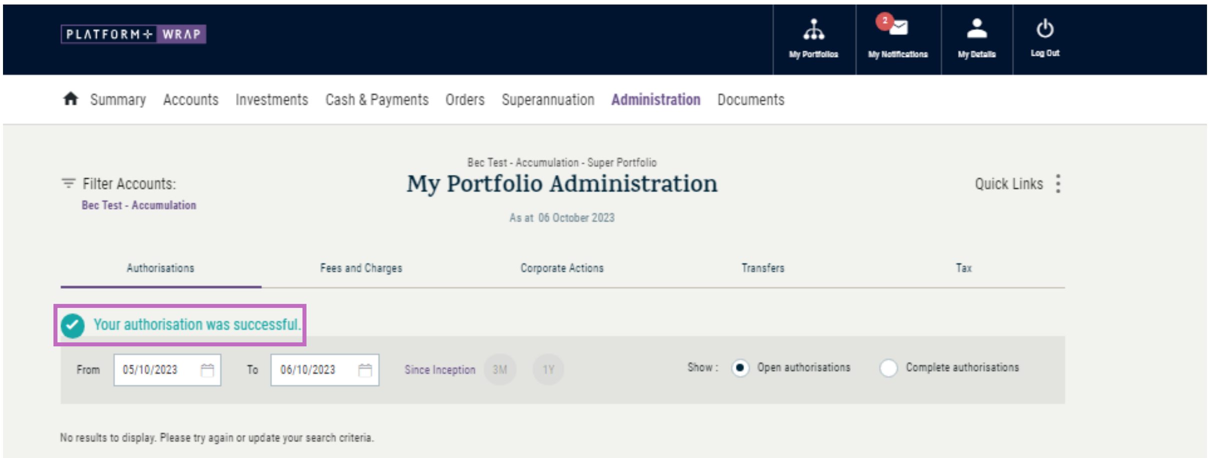
Authorise Reject

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

5. Enter code and click **Continue**

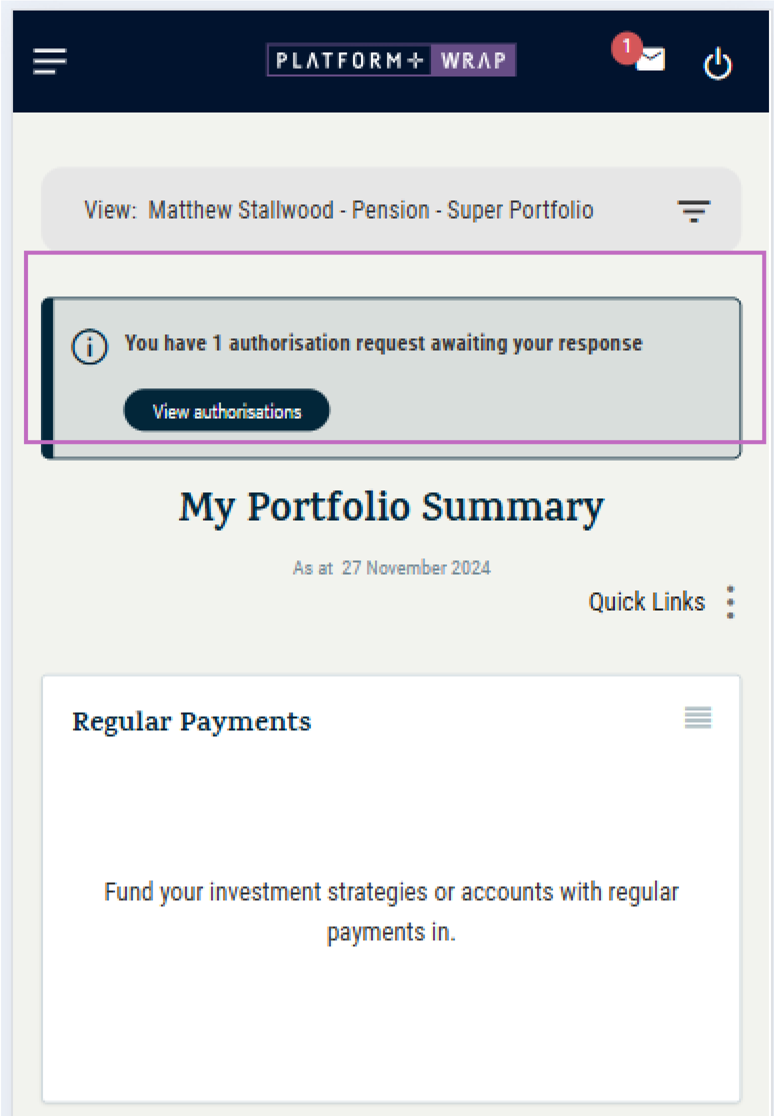


6. When successfully authorised, you will receive the following message

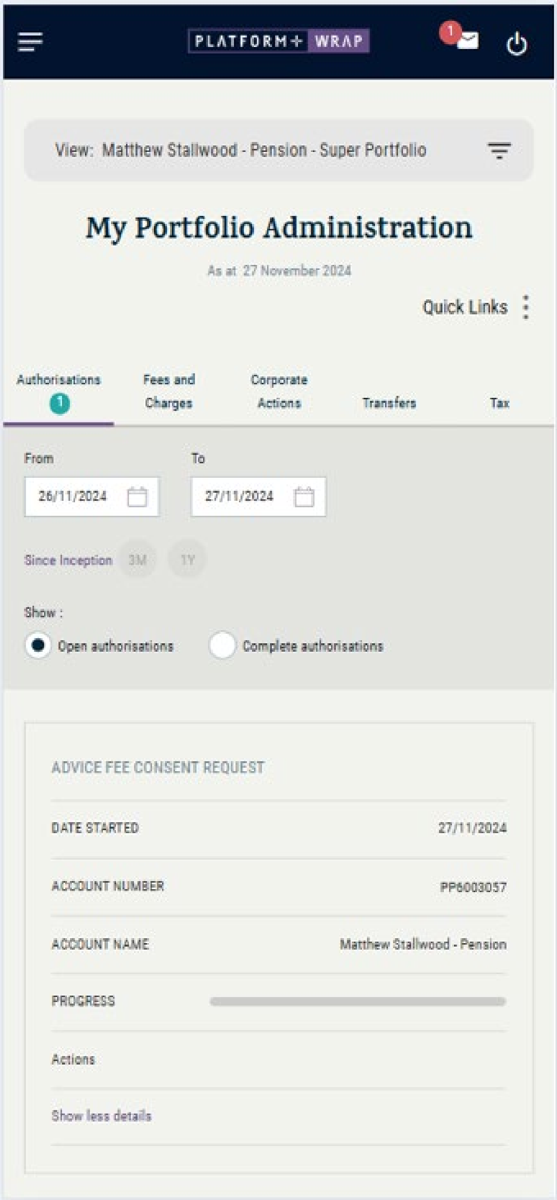


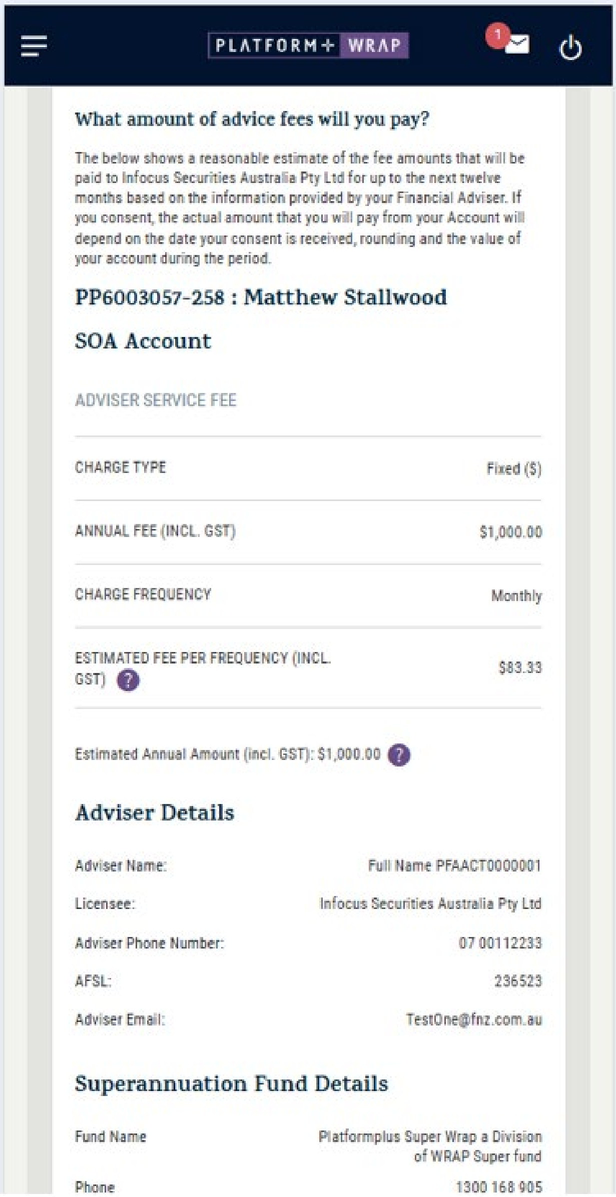
<u>Phone View:</u>

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



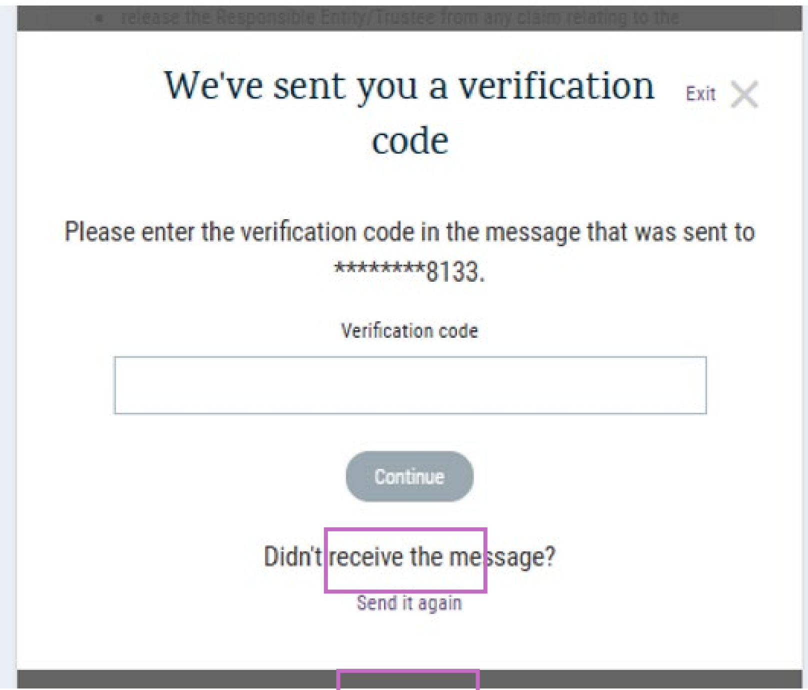
2. Under **Event** you will see the **Advice Fee Consent Request.** Scroll down to review the information.



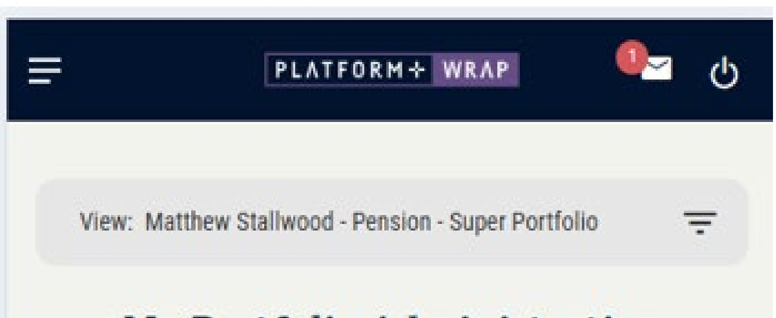


3. Click **Authrosie**

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@platformplus.com.au.