

Accepting an Ongoing Fee Renewal

Client guide only.

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

Web View:

- Once logged into your portal, click [View Authorisation](#) within the banner

The screenshot shows the user portal interface. At the top, there is a navigation bar with the Platform Plus Wrap logo and icons for My Portfolios, My Notifications (with a red notification badge), My Details, and Log Out. Below the navigation bar is a breadcrumb trail: Home > Accounts > Investments > Cash & Payments > Orders > Administration ¹ > Documents. A prominent notification banner at the top of the main content area states: "You have 1 authorisation request awaiting your response" with a "View authorisations" button. Below the banner is the "My Portfolio Summary" for Matthew Stallwood - Individual Portfolio, dated 27 November 2024. The summary is divided into three main sections: "Regular Payments" (with a sub-header "Fund your investment strategies or accounts with regular payments in."), "My Net Worth" (displaying \$0.00), and "Portfolio Valuation" (displaying \$0.00, N/A (\$0.00) (Last 30 days)). The "My Net Worth" section includes a table with columns "ASSETS AND DEBTS" and "VALUE":

ASSETS AND DEBTS	VALUE
On Platform Portfolios	\$0.00
Financial Assets	\$0.00
Non-Financial Assets	\$0.00
Debts and Liabilities	\$0.00

The "Portfolio Valuation" section includes a table with columns "ACCOUNT", "VALUE", and "LAST 30 DAYS":

ACCOUNT	VALUE	LAST 30 DAYS
Matts Account	\$0.00	N/A

- Click on [Authorisations](#) and expand the [Event](#)

The screenshot shows the "My Portfolio Administration" page for Bec Test - Accumulation - Super Portfolio, dated 06 October 2023. The page has a navigation bar with icons for My Portfolios, My Notifications (with a red notification badge), My Details, and Log Out. The breadcrumb trail is: Home > Summary > Accounts > Investments > Cash & Payments > Orders > Superannuation > Administration > Documents. The main content area features a "Filter Accounts" dropdown set to "Bec Test - Accumulation". Below this is a tabbed interface with "Authorisations" selected. The "Authorisations" tab includes a date range filter (From 05/10/2023 to 06/10/2023), a "Since Inception" filter with "3M" and "1Y" options, and a "Show" filter with "Open authorisations" (selected) and "Complete authorisations" options. Below the filters is a table with columns "EVENT", "DATE STARTED", "ACCOUNT NUMBER", "ACCOUNT NAME", and "PROGRESS":

EVENT	DATE STARTED	ACCOUNT NUMBER	ACCOUNT NAME	PROGRESS
+ Advice Fee Consent Request	06/10/2023	PP6001591	Bec Jones- Pension	<div style="width: 100%;"></div> Toggle the detail panel to authorise

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

Authorisations 1
Fees and Charges
Corporate Actions
Transfers
Tax

From To 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	<div style="width: 100%; height: 10px; background: linear-gradient(to right, #0070c0 90%, #ccc 90%);"></div>

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@fhtz.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.

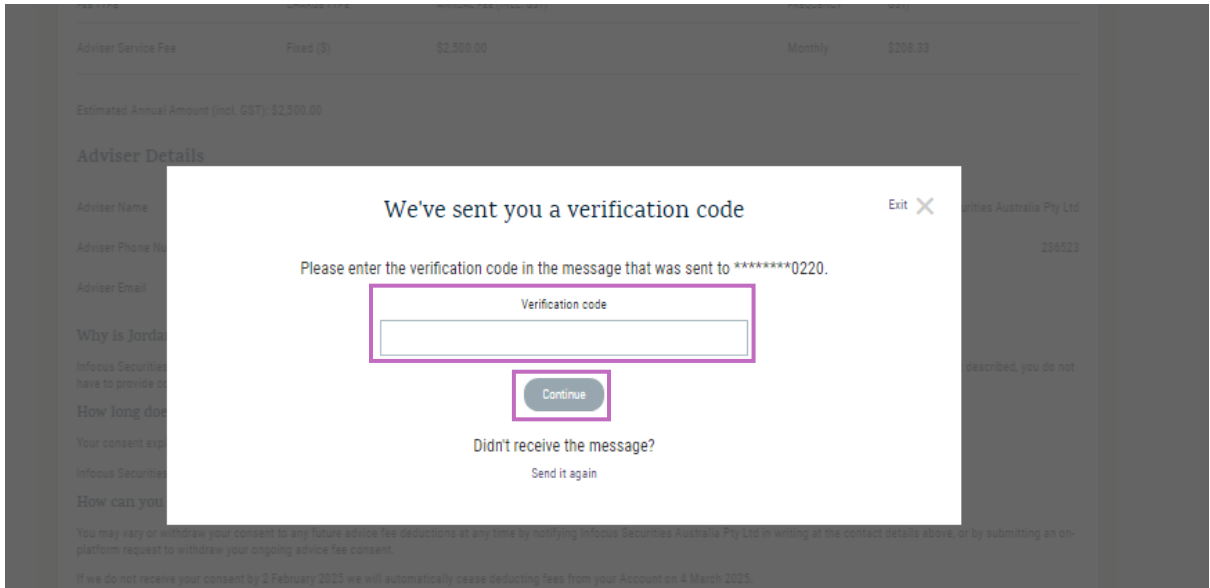
Please refer to the IDPS Guide for more information on fees and costs.

By consenting to the fees I:

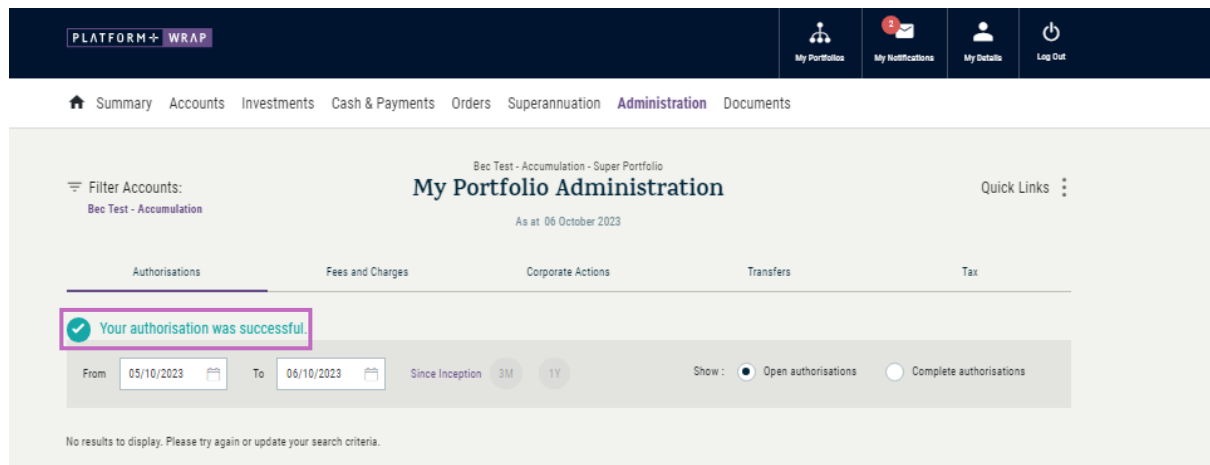
- understand the information provided above;
- understand that where my Financial Adviser is part of an adviser dealer group, payment will be made to that dealer group and not the individual adviser;
- request and authorise the advice fee(s) to be deducted from my Account(s) and to be paid to my Financial 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

- A pop-up box will then appear for you to enter a verification code. This code will be sent to your mobile
- Enter code and click **Continue**

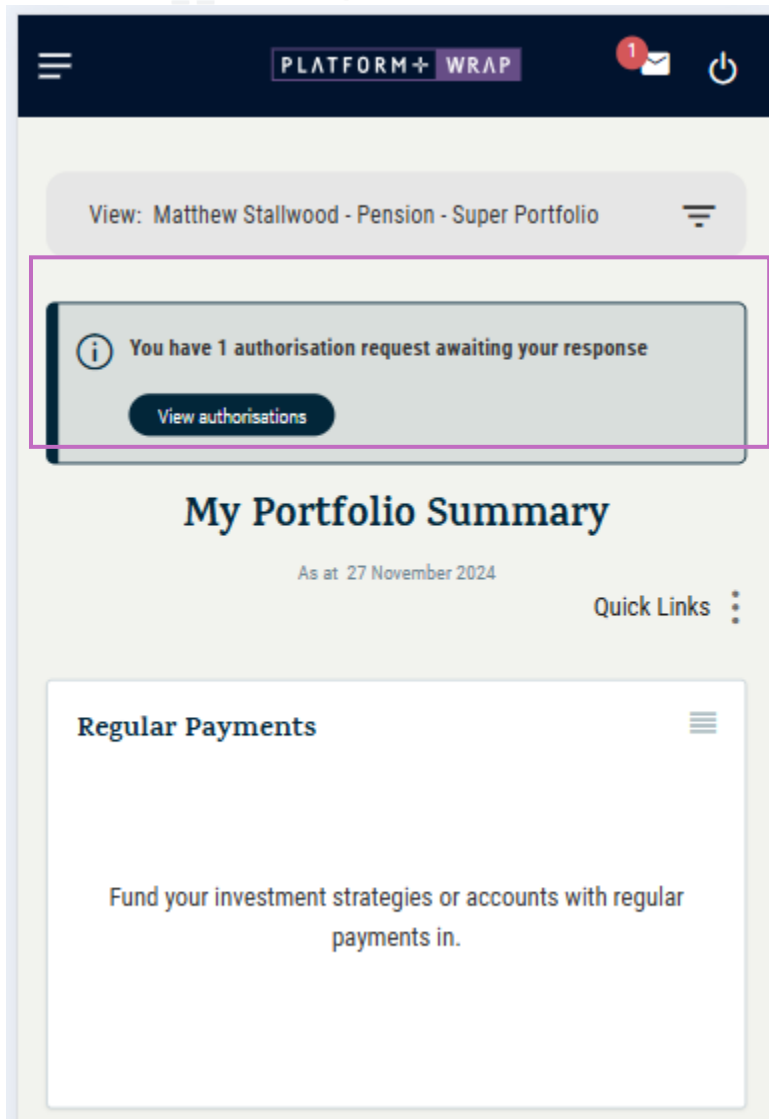


- When successfully authorised, you will receive the following message



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.

View: Matthew Stallwood - Pension - Super Portfolio

My Portfolio Administration

As at 27 November 2024

Quick Links

- 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

ADVICE FEE CONSENT REQUEST

DATE STARTED: 27/11/2024

ACCOUNT NUMBER: PP6003057

ACCOUNT NAME: Matthew Stallwood - Pension

PROGRESS:

Actions

Show less details

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.

PP6003057-258 : Matthew Stallwood

SOA Account

ADVISER SERVICE FEE

CHARGE TYPE	Fixed (\$)
ANNUAL FEE (INCL. GST)	\$1,000.00
CHARGE FREQUENCY	Monthly
ESTIMATED FEE PER FREQUENCY (INCL. GST) ?	\$83.33

Estimated Annual Amount (incl. GST): \$1,000.00 ?

Adviser Details

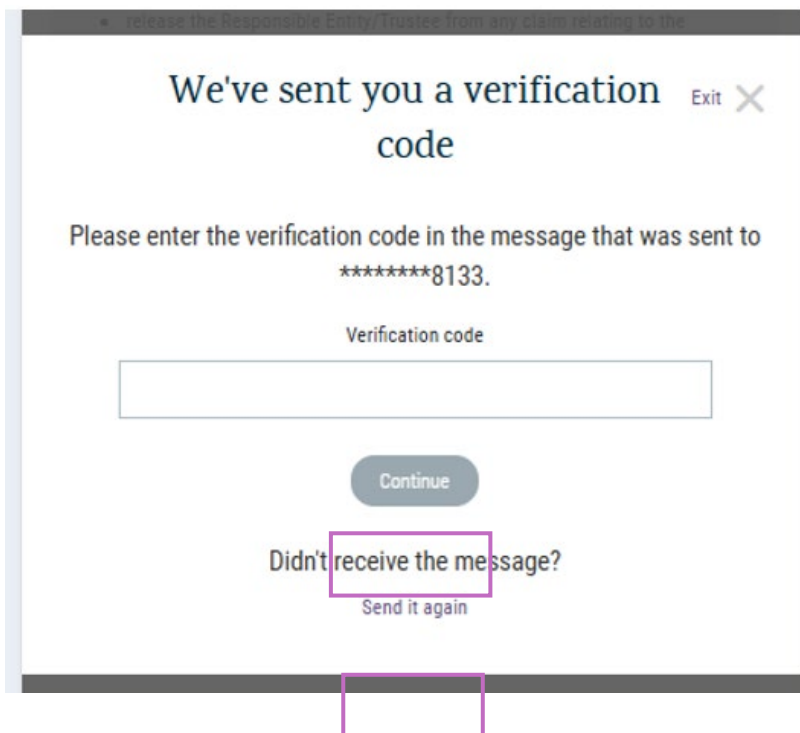
Adviser Name: Full Name PFAACT0000001
 Licensee: Infocus Securities Australia Pty Ltd
 Adviser Phone Number: 07 00112233
 AFSL: 236523
 Adviser Email: TestOne@fnz.com.au

Superannuation Fund Details

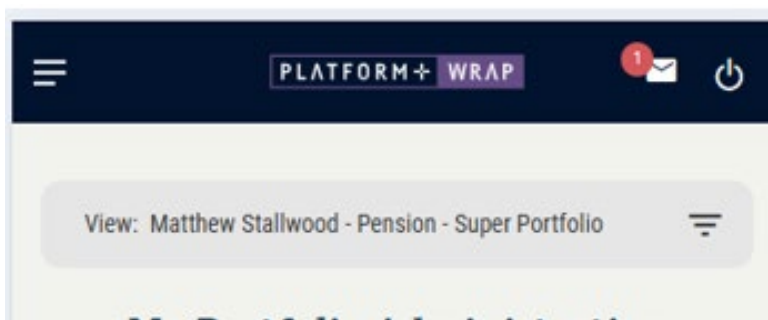
Fund Name: Platformplus Super Wrap a Division of WRAP Super fund
 Phone: 1300 168 905

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.