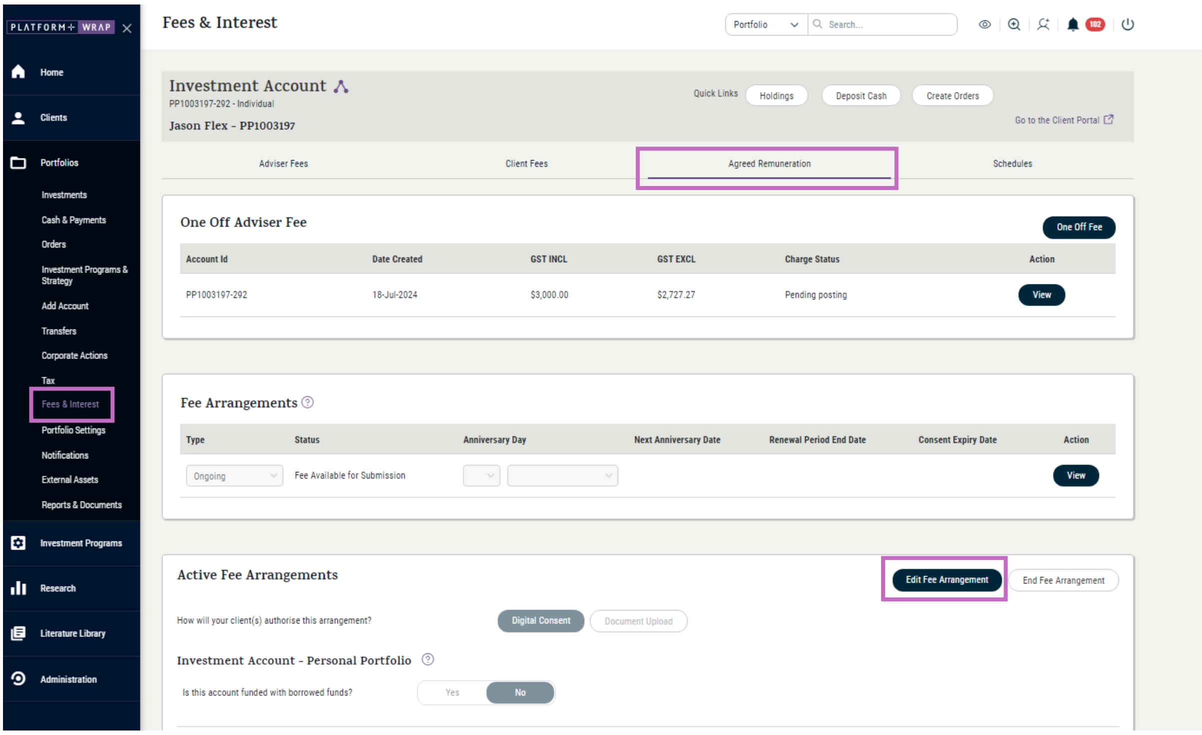
Adding a fixed term agreement to an existing client (no existing fee)

Adviser guide only.

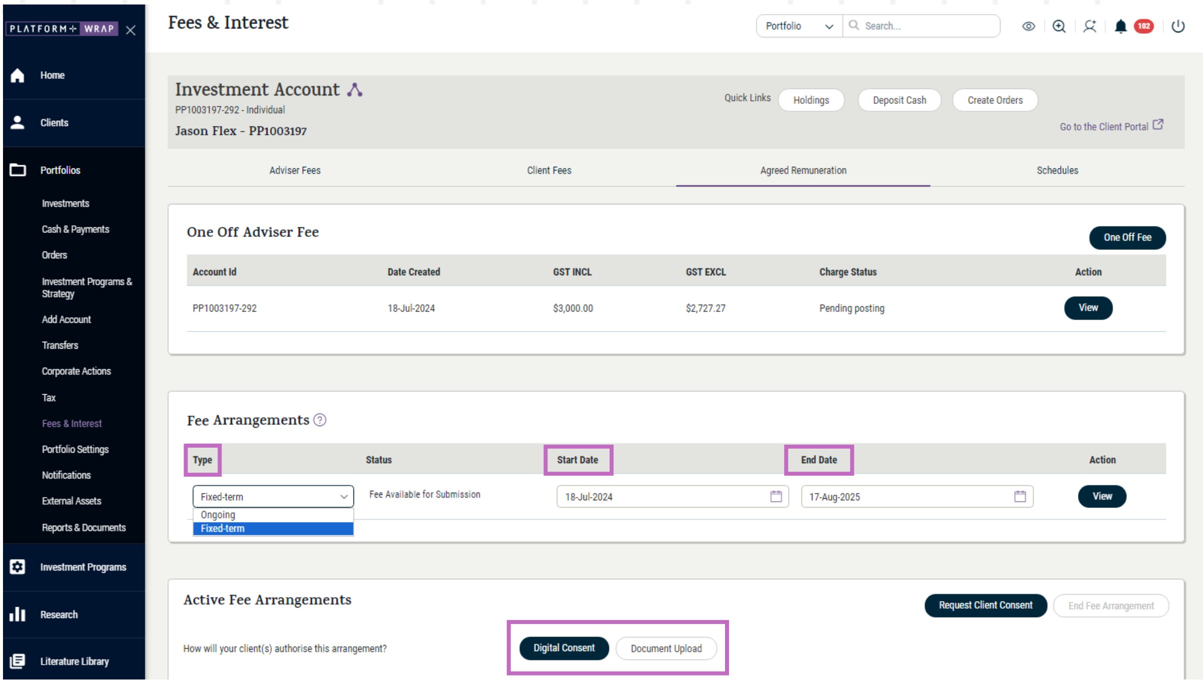
This guide provides instructions on how add a Fixed term to an active portfolio that has no existing fee. There is online and digital acceptance available on active accounts for all fees types

When adding a fee arrangement onto an active account, take the following steps:

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

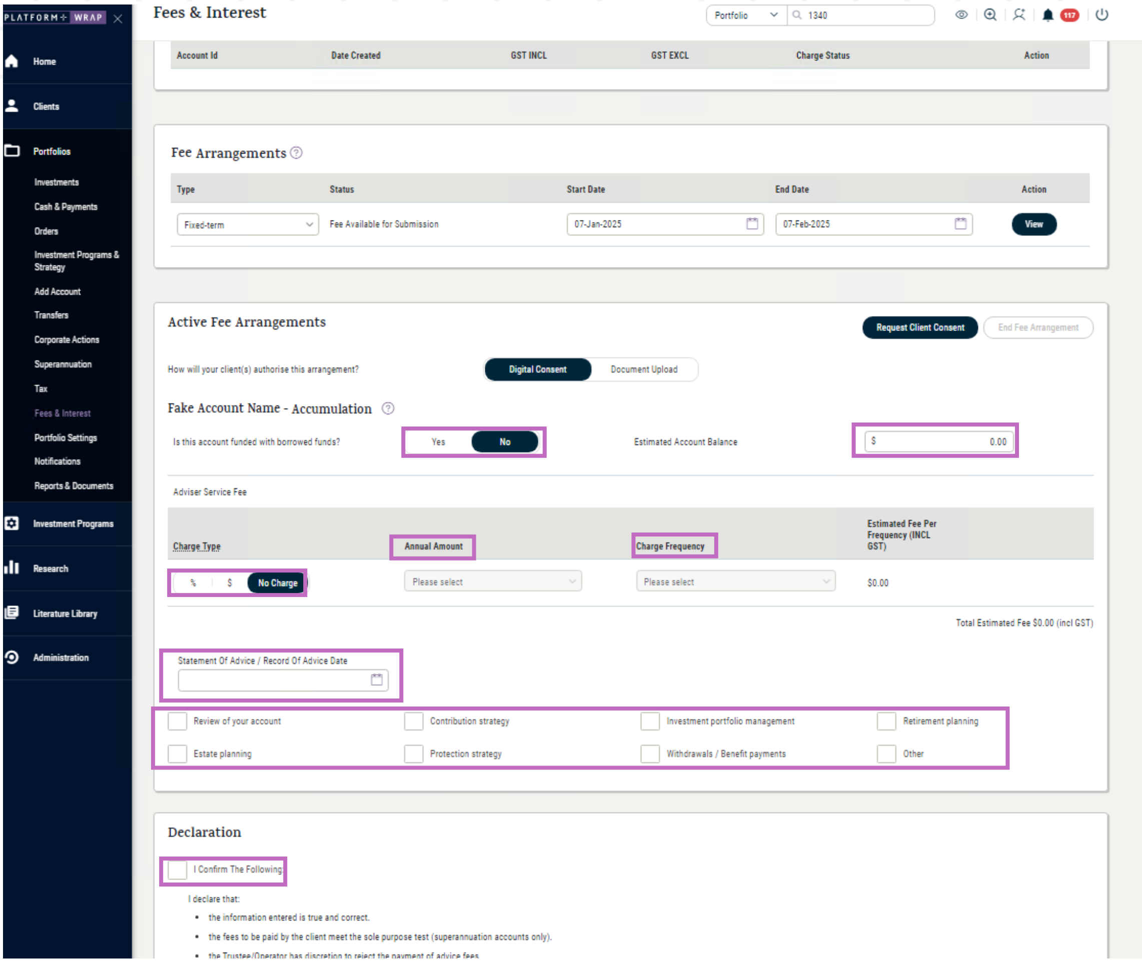


3. In the **Fee Arrangements** box under **Type**, select **Fixed-term** via the drop-down box
4. Alter the start and end dates as required
5. From here, you have two authorisation methods, **Digital Consent** or **Document Upload**



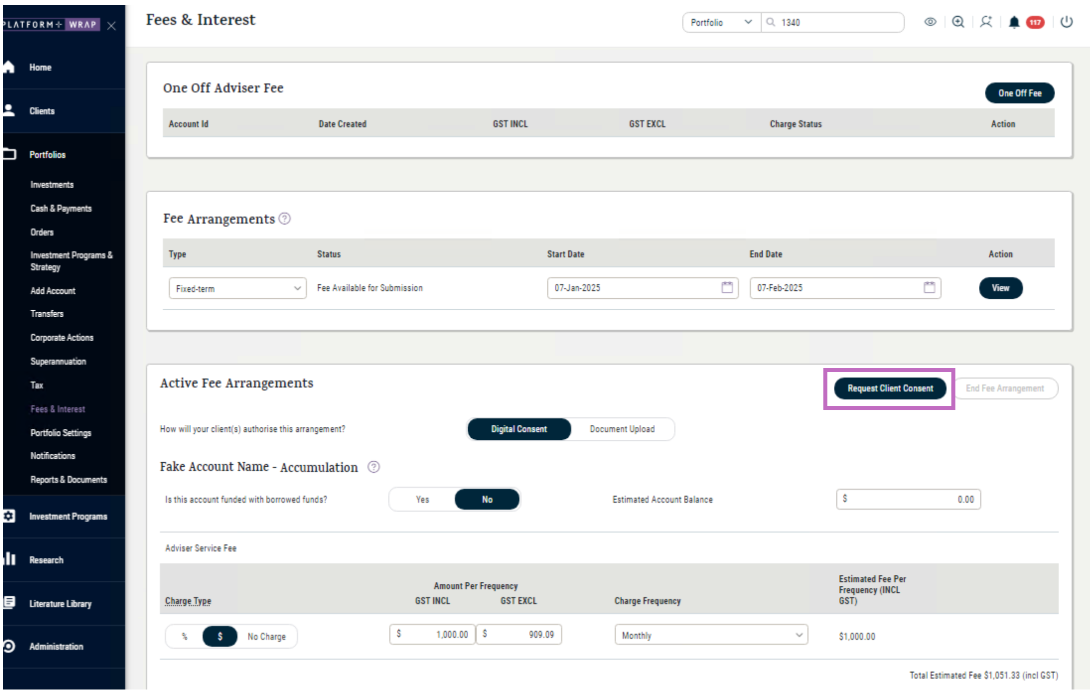
Option 1: Digital Consent (client to accept via the client portal)

1. Answer the **Is this account funded with borrowed funds?** question
2. Enter the **Estimated Account Balance**. NOTE: this field only activates if a % fee is being charged
3. If the account is funded with borrowed funds, click **Yes**. NOTE: the platforms default on this question if No
4. Select **Charge Type**. NOTE: if you select **No Charge**, no fee will be applied
5. Complete the amount per frequency and **Charge Frequency** fields
6. Confirm all details are correct, then read and tick the **Declaration** box
7. Enter the statement of advice date
8. Check the relevant service box

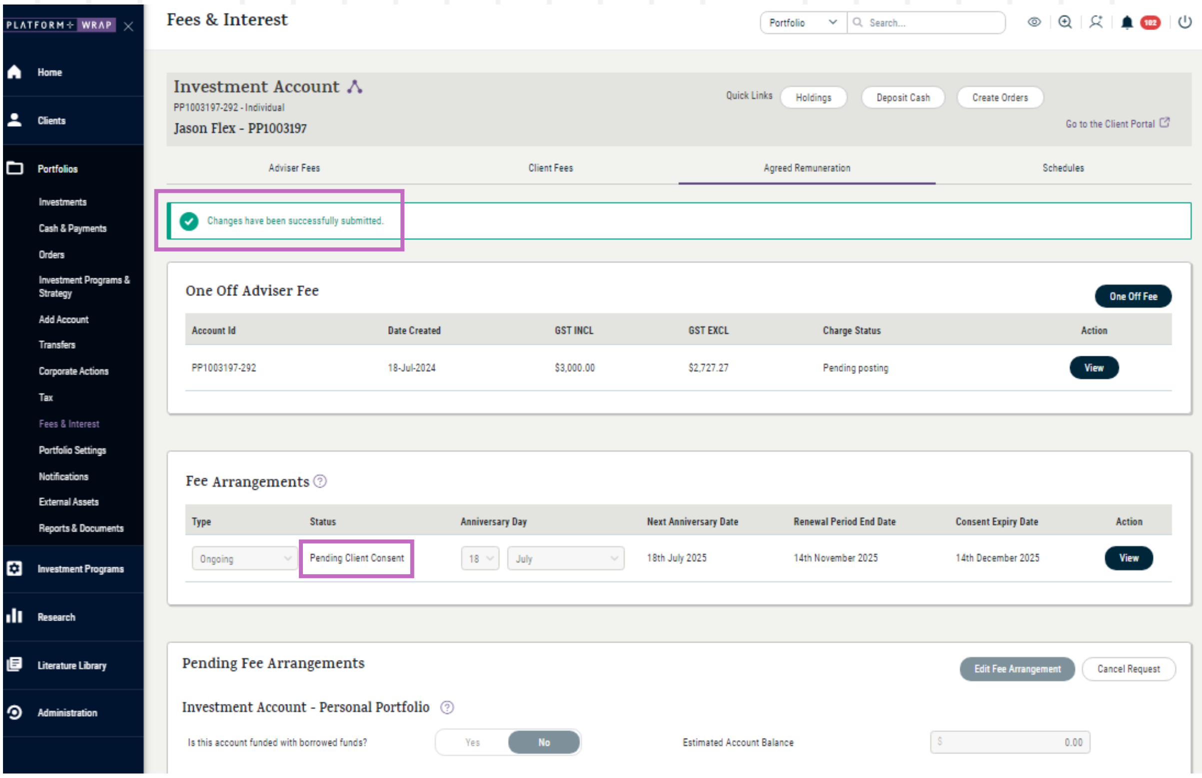


Pro Tip: *When entering a dollar based Fixed term amount, please ensure you enter the Frequency Amount NOT the annual amount.*

9. Click **Request Client Consent**

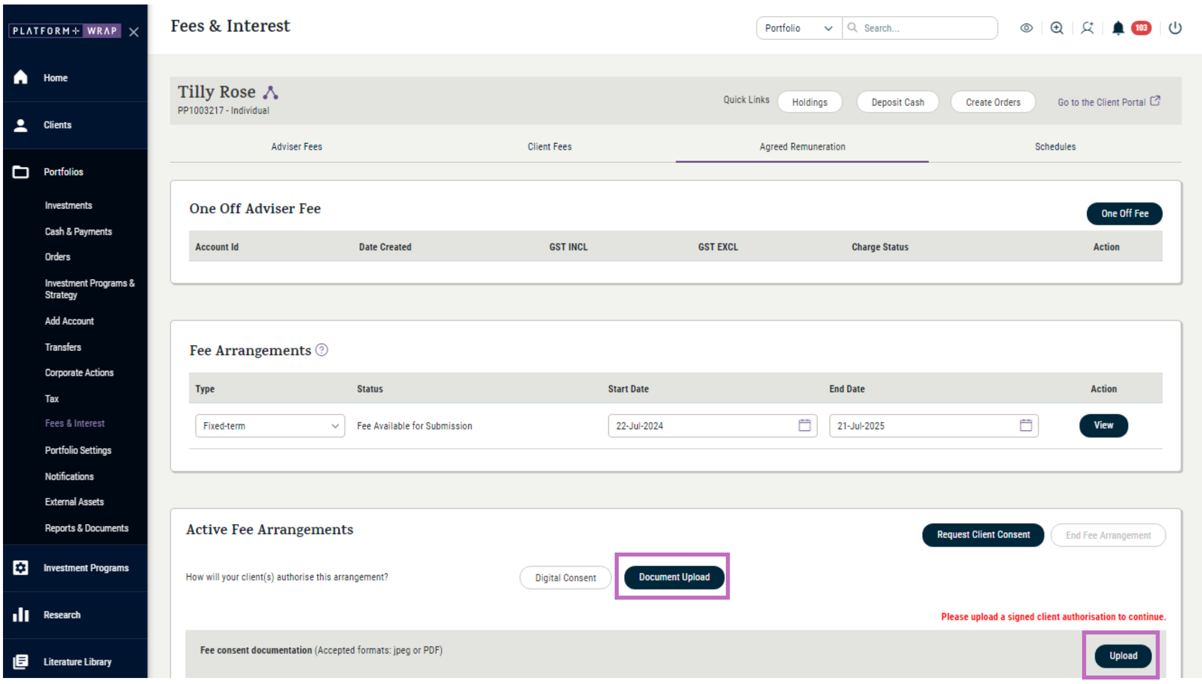


10. Once the Fixed term fee has been submitted, you will receive the following notification. The status in the Fee Arrangements screen will change to **Pending client consent**.



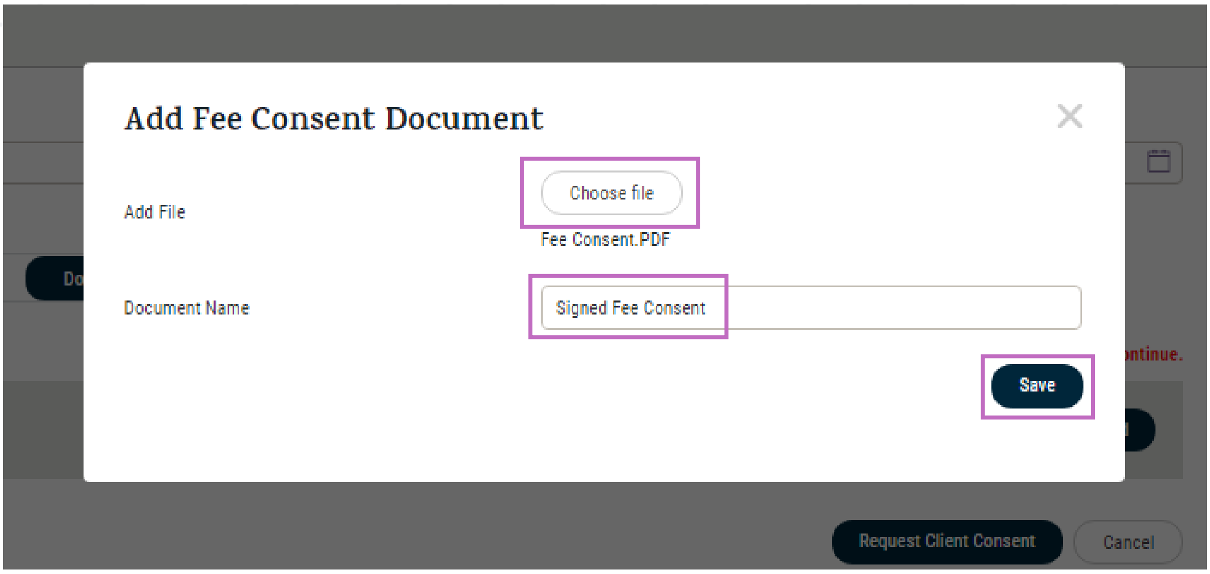
Option 2: Document Upload – for clients that have signed a paper fee consent form

1. Click on **Document Upload**
2. Click **Upload**



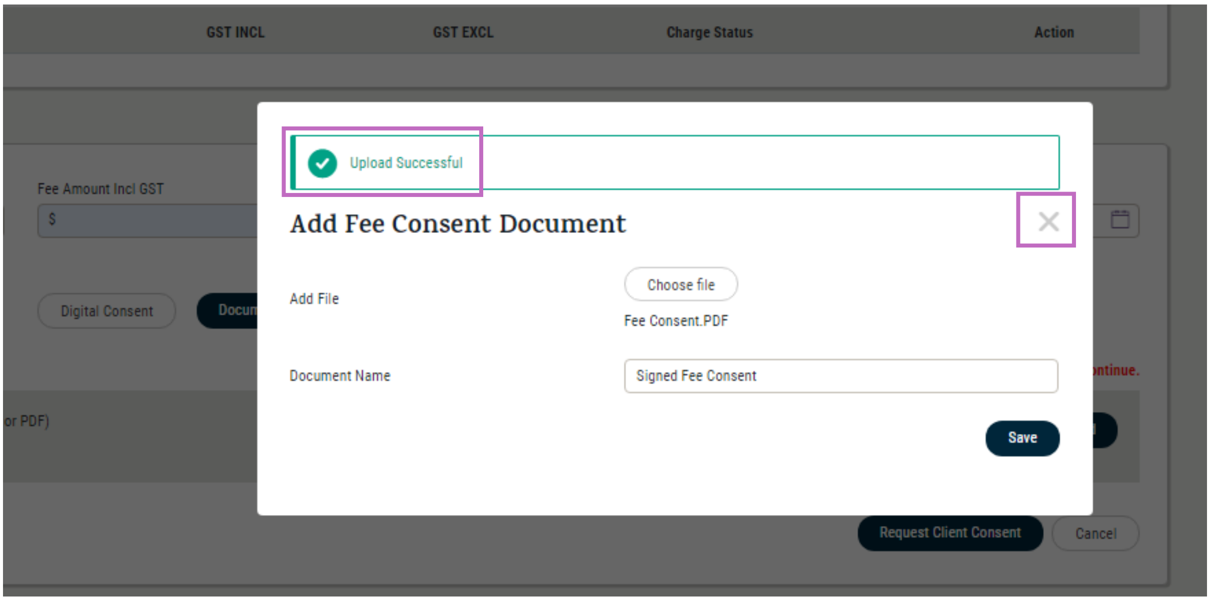
3. Click **Choose file**, select PDF document
4. Enter the **Document Name**

5. Click **Save**

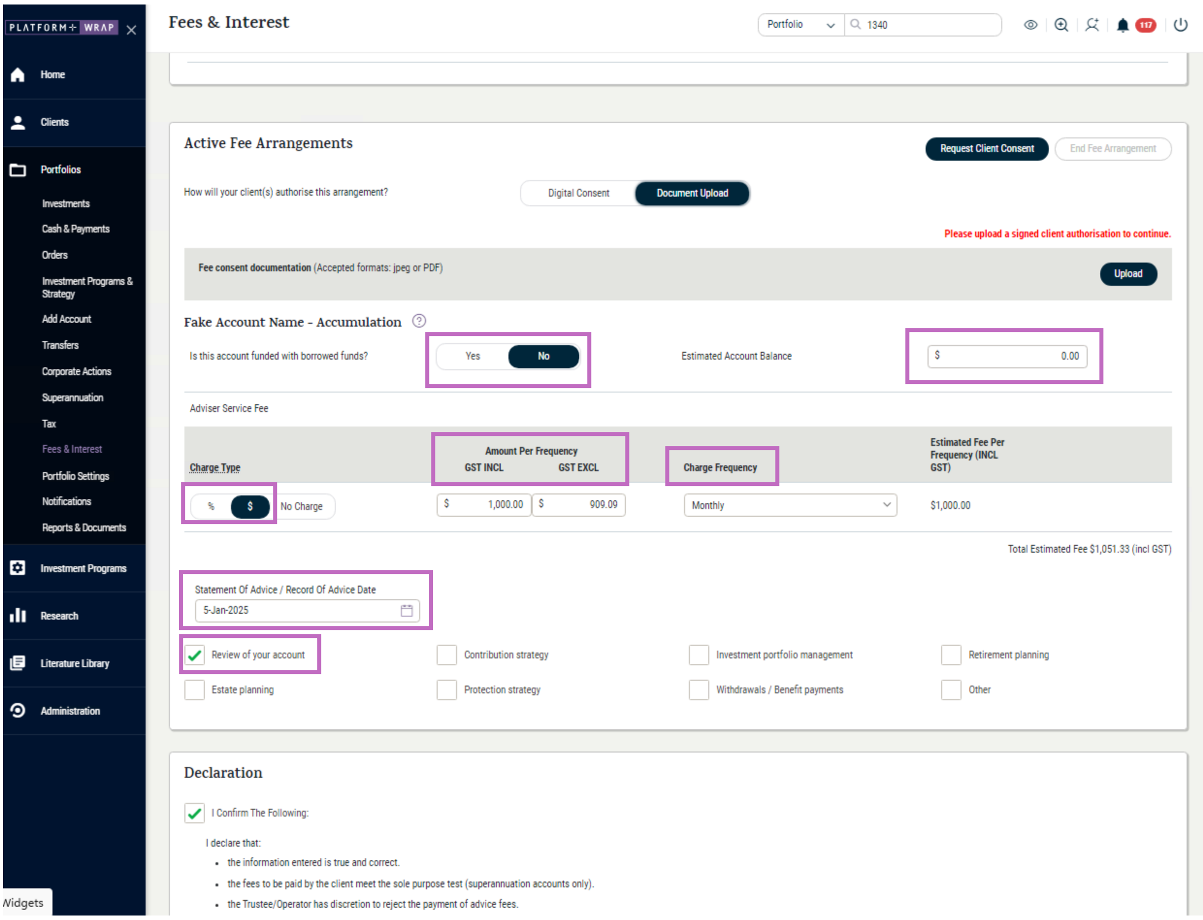


Pro Tip: *Where you need to upload a second document, (for example a DocuSign Summary) repeat the step above.*

6. Once successfully uploaded, you will receive the following message. Close the window

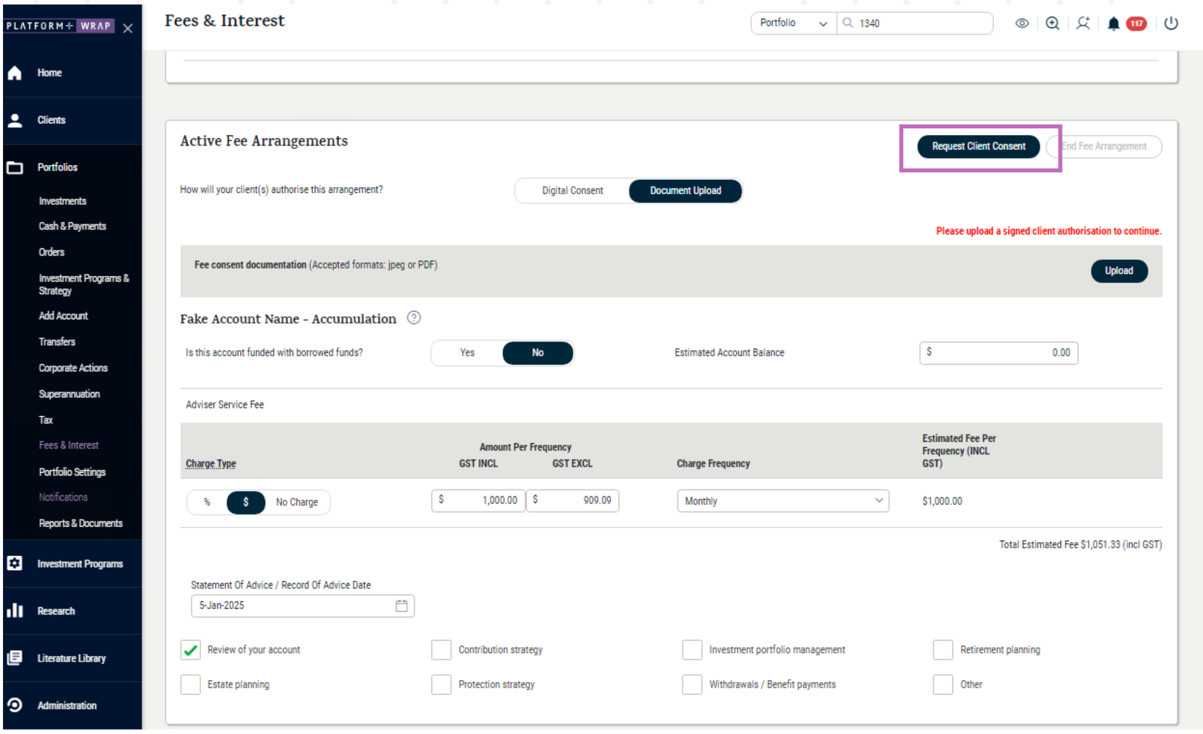


7. Answer **Is this account funding with borrowed funds?** Question
8. Enter the **Estimated Account Balance**. NOTE: this field only activates if a % fee is being charged
9. If the account is funded with borrowed funds, click **Yes**. NOTE: the platforms default on this question is No
10. Select **Charge Type**. NOTE: if you select **No Charge**, no fee will be applied
11. Complete the **Amount Per Frequency** and **Charge Frequency** fields
12. Confirm all details are correct, then read and tick the **Declaration** box
13. Enter the statement of advice date
14. Check the relevant service box

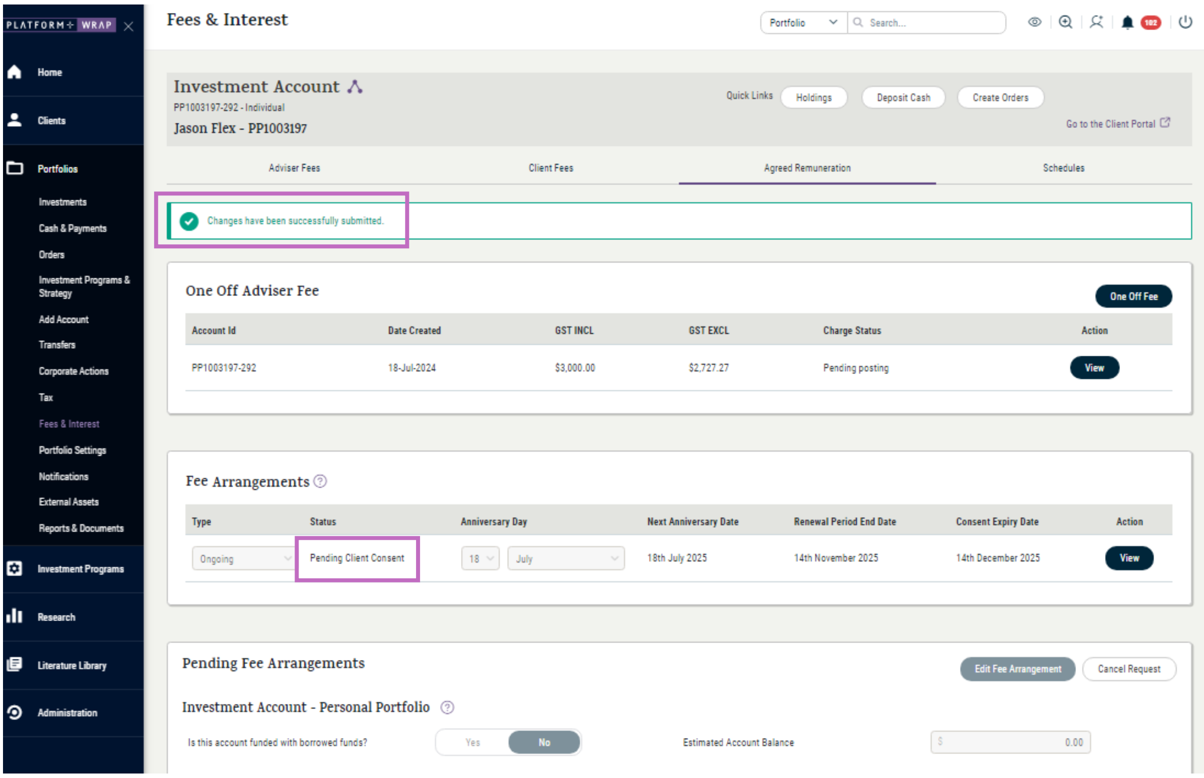


Pro Tip: *When entering a dollar based Fixed term amount, please ensure you enter the Frequency Amount NOT the annual amount.*

15. Click **Request Client Consent**



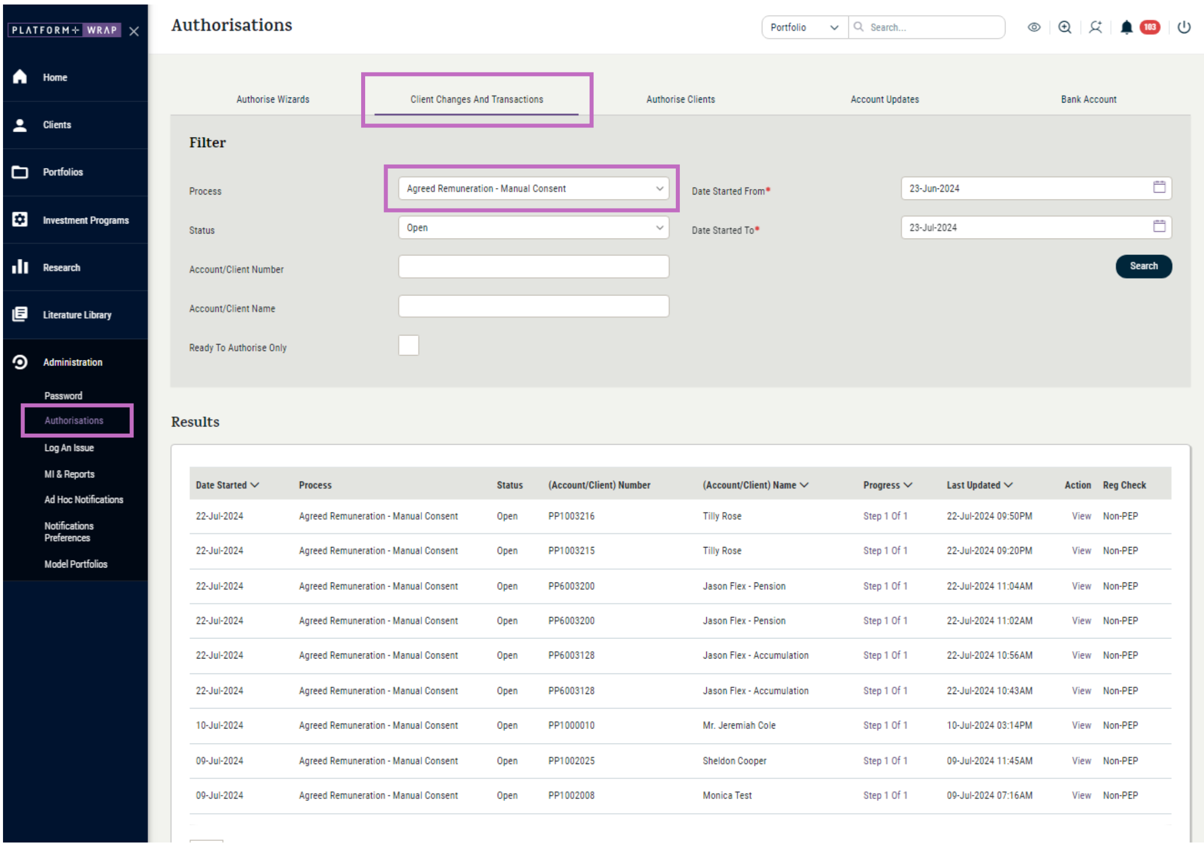
16. Once the fixed term fee has been submitted, you will receive the following notification. The status in the Fee Arrangements screen will change to Pending Client Consent



Upon submission, a Platform Administration user will review the signed fee consent form and on-platform fee details. If no further action is required, the fee will be accepted and the arrangement, activated. We may contact you for further information, if required.

Pro Tip: *Ensure that the online and paper fee details exactly match. If not, the signed form will not be accepted.*

You can view the status of all paper fee consent requests at any time by navigating to **Administration** > **Authorisations** > **Client Changes and Transaction**:



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.