

Application and Form Change Update Guide

Effective 9 December, 2025

This document outlines recent updates to application and forms.

The Key changes include:

- Addition of new sections for **Accumulation** and **Pension Applications**
- Updates to three supporting forms

Accumulation Application Inclusion

- Rollover details

Pension Application Inclusion

- Rollover details
- Pension entitlement information (including bank details)
- Beneficiary details

Updated Supporting Forms

- Pension Details Form
- Pension Details Form – Adviser Initiated
- Rollover Form

Accumulation Application:

Both the online and paper-based forms have been updated to include rollover details. Multiple rollovers can be added during the application process. Once the application is approved, all specified rollovers will be automatically initiated.

Please ensure you add:

1. One Individual Portfolio Holder.

If you are commencing the accumulation account with a rollover from an external superannuation fund and/or SMSF, please provide these details in step 4 and we will initiate the rollover on your behalf. Step 4 can be left blank if there is no rollover.

Company

Company Name PFAAAA

Adviser

Please select

Search for Existing Clients

Create New Client

New Accumulation Portfolio

- Add Clients
- Portfolio Details
- Investments
- Rollover Details
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

Section 4 – Rollover Details

The inclusion of the rollover details in the application means the rollover form is no longer required.

You can request one or multiple rollovers including either full or partial rollovers from both Super Funds and SMSFs.

Super Fund Rollover

When adding multiple rollovers, select **“Add Another Super Fund.”**

The **USI/ABN** field is searchable and will automatically populate the **Fund Name** field.

Rollover Details

Add A Rollover Fund (Optional)

Fund Type*	USI/ABN*	Fund Name*	Fund Member Number	Electronic Service Address	Rollover Type*	Estimated Rollover Amount*	Actions
<div>Super fund</div> <div>SMSF</div>	<div>USI</div>	<div>Fund name</div>		<div>N/A for External</div>	<div>Full</div> <div>Partial</div>	<div>\$</div>	<div></div>

Add Another Super Fund

New Accumulation Portfolio

- Add Clients
- Portfolio Details
- Investments
- Rollover Details
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

SMSF Rollover

The **USI/ABN** field is searchable and will verify whether the number entered is valid.

When entering the **Fund Name**, you can include special characters such as **&**.

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Rollover Details

Add A Rollover Fund (Optional)

Fund Type*	USI/ABN*	Fund Name*	Fund Member Number	Electronic Service Address	Rollover Type*	Estimated Rollover Amount*	Actions
Super fund	<div>SMSF</div>	<div>ABN</div>	<div>Fund name</div>	<div></div>	<div>Required</div>	<div>Full</div> <div>Partial</div>	<div>\$</div> <div></div>

Add Another Super Fund

New Accumulation Portfolio

- Add Clients
- Portfolio Details
- Investments
- Rollover Details**
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

Pension Application

You can request one rollover Super Funds or SMSFs. Where there are multiple rollovers, you will first need to open an Accumulation portfolio and once all rollovers received convert to a Pension portfolio.

The inclusion of the Rollover details and Pension entitlement information (including bank details) is mandatory to submit the application and therefore the supporting forms are no longer required.

For the Beneficiary details, where electing a Binding Nomination as fully completed form is required to be uploaded on the Document section of the application.

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Please ensure you add:

- One Individual Portfolio Holder.

If you are commencing a pension account using an existing PlatformplusWrap accumulation account, please proceed to the "Super Transfer" section of the Superannuation menu.

To commence a Pension Account with one or more rollovers from an external superannuation fund or an SMSF, all rollovers must be received in a PlatformplusWRAP accumulation account and then transferred to a Pension Account.

A new pension account can only be created using a single rollover. This rollover cannot be combined with an existing PlatformplusWrap accumulation account.

Company

Company Name PFAAAA

Adviser

Please select

Search for Existing Clients

Create New Client

New Pension Portfolio

- Add Clients**
- Portfolio Details
- Investments
- Rollover Details
- Pension Payment Details
- Beneficiaries
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

Section 4 – Rollover Details

The inclusion of the rollover details in the application means the rollover form is no longer required.

You can request one rollover, full or partial, from either Super Funds and SMSFs.

Super Fund Rollover

When adding multiple rollovers, select **“Add Another Super Fund.”**

The **USI/ABN** field is searchable and will automatically populate the **Fund Name** field.

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Rollover Details

Add Rollover

Select the type of superannuation fund you would like to rollover from:

Rollover Fund

SMSF

Add A Rollover Fund

USI*	Fund Name*	Fund Member Number	Rollover Type*	Estimated Rollover Amount*	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<div>Full</div> <div>Partial</div>	\$ <input type="text"/>	

New Pension Portfolio

- Add Clients
- Portfolio Details
- Investments
- 4. Rollover Details**
- Pension Payment Details
- Beneficiaries
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

SMSF Rollover

The **USI/ABN** field is searchable and will verify whether the number entered is valid.

When entering the **Fund Name**, you can include special characters such as **&**.

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Rollover Details

Add Rollover

Select the type of superannuation fund you would like to rollover from:

Rollover Fund

SMSF

Add A Rollover Fund

ABN*	Fund Name*	Fund Member Number	Electronic Service Address*	Rollover Type*	Estimated Rollover Amount*	Actions
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<div>Full</div> <div>Partial</div>	\$ <input type="text"/>	

New Pension Portfolio

- Add Clients
- Portfolio Details
- Investments
- 4. Rollover Details**
- Pension Payment Details
- Beneficiaries
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

5. Pension Payment Details

Pension Entitlements

Payment frequency options remain unchanged.

The initial payment date will default to the next available payment date based on the selected frequency. You also have the option to amend this to a future month if required.

If a nominated amount below the ATO minimum is selected, it will now be accepted. However, at the end of the financial year, if the ATO minimum has not been met, an additional payment will be automatically made to the client to ensure compliance.

Bank Account Details

Please ensure all information entered is accurate and upload the supporting bank statement to **Section 7** of the application.

If bank account details are incorrect, a new application will need to be submitted.

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Pension Details

Pension Payment Frequency
Monthly

First Payment Date
10-Jan-2026

Values and payment dates are subject to change based on the establishment of a balance in the pension account and receiving member authorisation. If the establishment of a balance in the pension account or member authorisation is received within five business days of the selected first payment date, the pension will commence in the following payment period.

Pension Payment Type

Minimum Amount

Nominated Amount

Bank Account Details

The bank account must be an Australian bank account in the name of the pension applicant (joint accounts are allowed). A current bank statement showing the BSB, account number, and account holder's name must be provided with this application. Please ensure all entered data matches the statement exactly—any discrepancies will result in rejection of the application.

Account Name *

BSB *

Account Number *

Bank Name

Clear

New Pension Portfolio

1. Add Clients

2. Portfolio Details

3. Investments

4. Rollover Details

5. Pension Payment Details

6. Beneficiaries

7. Documentation

8. Summary

Exit Without Saving

Save and Resume Later

Next step

6. Beneficiaries

All beneficiary types require the same information. Below are screenshots illustrating each type of Beneficiary and the information required.

If you are electing a Binding Nomination, a completed Beneficiary Nomination Form must be uploaded in Step 7 of the onboarding wizard.

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Beneficiaries

Type Of Nomination

☒ No Nomination
 ☐ Binding Nomination (Non-Lapsing)
 ☐ Binding Nomination (Lapsing)
 ☐ Non-Binding Nomination
 ☐ Reversionary Nomination

By selecting 'No Nomination', the entire benefit will be paid to your client's estate.

New Pension Portfolio

- Add Clients
- Portfolio Details
- Investments
- Rollover Details
- Pension Payment Details
- Beneficiaries**
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

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Beneficiaries

Type Of Nomination

☐ No Nomination
 ☒ Binding Nomination (Non-Lapsing)
 ☐ Binding Nomination (Lapsing)
 ☐ Non-Binding Nomination
 ☐ Reversionary Nomination

New Pension Portfolio

- Add Clients
- Portfolio Details
- Investments
- Rollover Details
- Pension Payment Details
- Beneficiaries**
- Documentation
- Summary

Exit and Cancel Application

Save and Resume Later

Next step

Binding Nomination (Non-Lapsing) Details

Add Beneficiaries

Each beneficiary must have an allocation percentage greater than 0%

Beneficiary	Date Of Birth	Relationship	Allocation	Remove
<div> <div>Relationship With Member*</div> <div>Please select</div> </div> <div> <div>Title*</div> <div>Please select</div> </div> <div> <div>First Name*</div> <div></div> </div> <div> <div>Middle Name</div> <div></div> </div> <div> <div>Last Name*</div> <div></div> </div>	<div> <div>Date Of Birth*</div> <div></div> </div>		<div> <div></div> <div>%</div> </div>	<div>Remove</div>

Postal Address

Address Line 1*

Line 1

Address Line 2

Line 2

Suburb*

Suburb

State*

State

Postcode*

Postcode

Add another beneficiary

Beneficiary Form

A Binding Nomination (Non-Lapsing) beneficiary nomination is only valid if accompanied by a completed 'Beneficiary Nomination Form' which must be completed and signed by witnesses. A copy of this form can be downloaded [here](#) and can be attached to this application via the Document upload function.

Download Form

Documentation

Please upload the (mandatory) supporting documentation listed below (as applicable):

- Proof of identity documentation: A certified copy of identification documents.
- Bank Statement: A copy of a current bank statement in the name of the pension applicant (joint accounts are permissible). The statement must show the BSB and account number (must be an Australian bank account).
- Binding Nomination Form: If a Binding Nomination forms part of this application, please submit a copy of the Binding Nomination form.

Upload requirements:

- Maximum size - 20 MB.
- File Formats - PDF, XLS, CSV, PNG, JPEG

Upload New File

Document Added To	Document Type	File Name	Status	Action
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New Pension Portfolio

1. Add Clients

2. Portfolio Details

3. Investments

4. Rollover Details

5. Pension Payment Details

6. Beneficiaries

7. Documentation

8. Summary

Exit and Cancel Application

Save and Resume Later

Next step