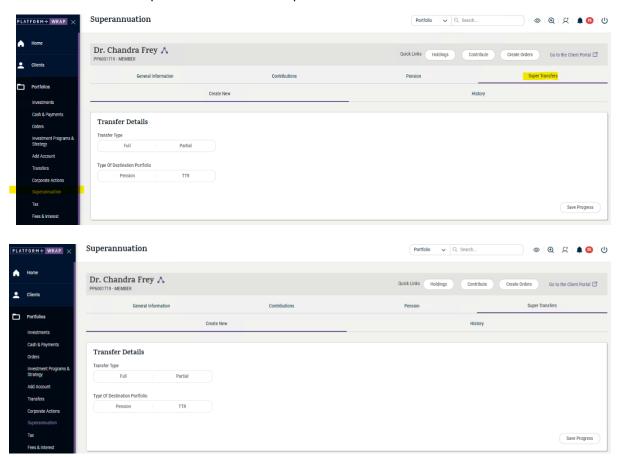
Conversion <a href="https://platformpluswrap.com.au/">https://platformpluswrap.com.au/</a> Guide: Partial conversion from Superannuation to Pension.

This guide is to be used for the process of a partial conversion from a superannuation portfolio into a pension portfolio via the Super Transfer functionality on Platformplus WRAP.

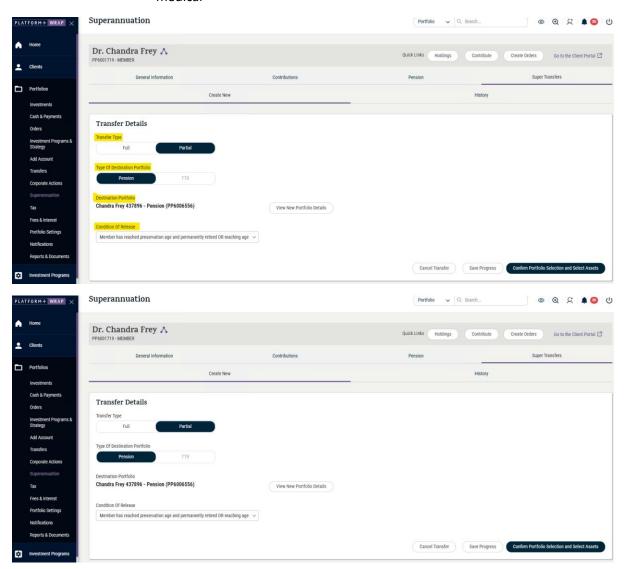
Please note that the guide on creating a new portfolio (which is part of Step 2 – destination portfolio) can be found within the onboarding guide

- 1. From the client's portfolio,
  - a. Click Superannuation from the left-hand menu
  - b. Click Super Transfer from the top menu



- 2. Complete the steps on the page including:
  - a. Select Transfer Type
    - i. Full or Partial Select Partial
  - b. Type of Destination Portfolio
    - i. Pension & TTR
  - c. Destination Portfolio
    - Please click the Create a New Portfolio and following the onboarding wizard.
      Once created, click submit and then exit to bring you back to the super transfer screen.
  - d. Condition of Release:
    - i. Member has reached age 65

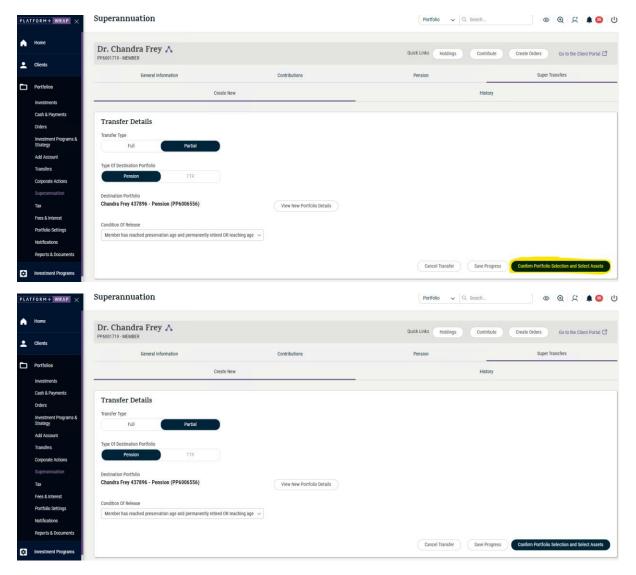
- ii. Member has reached preservation age and permanently retired OR reaching age 60 and ceasing an employment arrangement
- iii. Total and permanent incapacity to start a pension OR having terminal medical



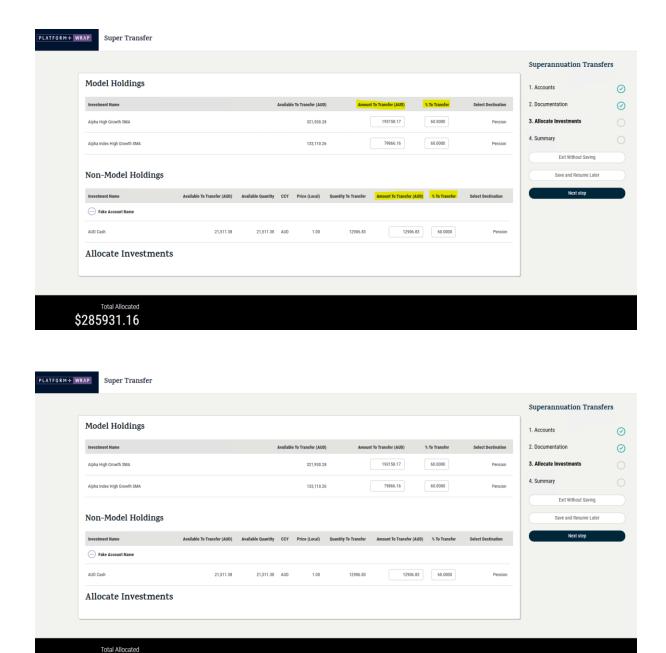
PS: Please note, if you encounter a red warning noting there are pending transactions, these transactions will need to complete before the Super Transfer can be completed.

Please contact the support team on 1300 191 952 or email <a href="mailto:support@platformpluswrap.com.au">support@platformpluswrap.com.au</a> for any questions or assistance.

3. Click "Confirm Transfer Details and Review"

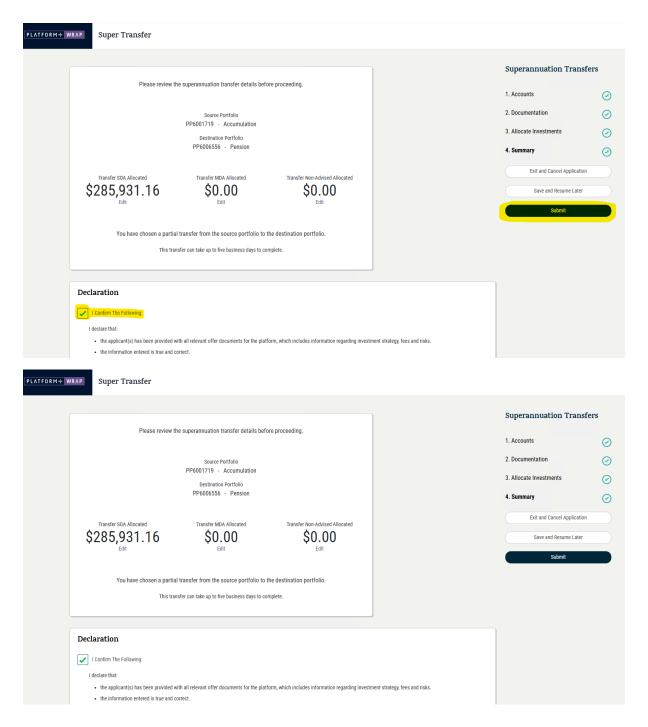


- 4. Superannuation Transfer Available Accounts
  - a. Complete the 4-step wizard
    - i. Accounts this will bring up the pension created in Step 2 review and continue.
    - ii. Documentation If documents have not be added via the pension onboarding wizard in Step 2, this section will provide details on how these can be uploaded.
    - iii. Allocate Investment Enter Amount OR % to Transfer into new pension portfolio

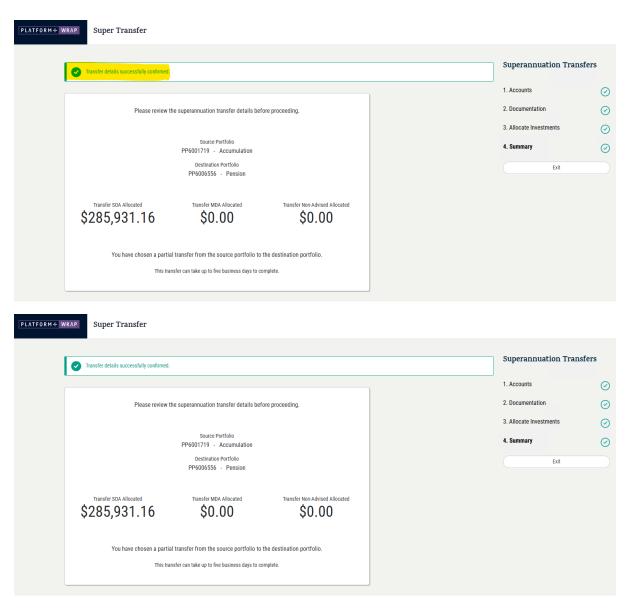


iv. Summary – Review details entered, tick declaration and submit

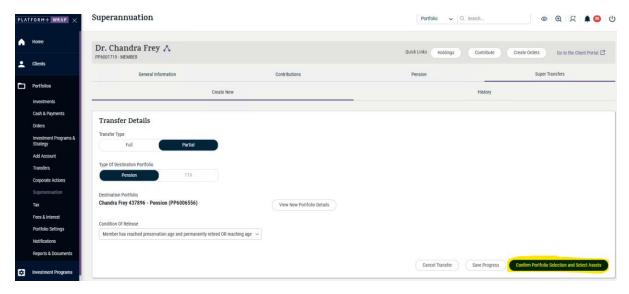
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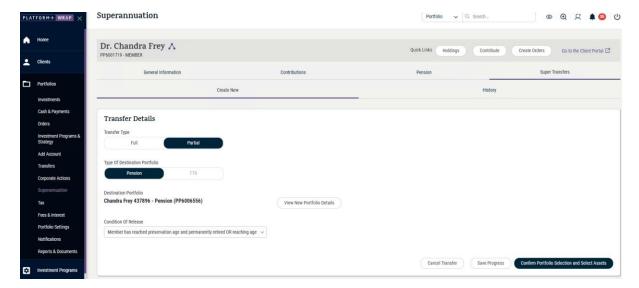


5. Once submitted you will get a green tick and message stating "Transfer details successfully confirmed".

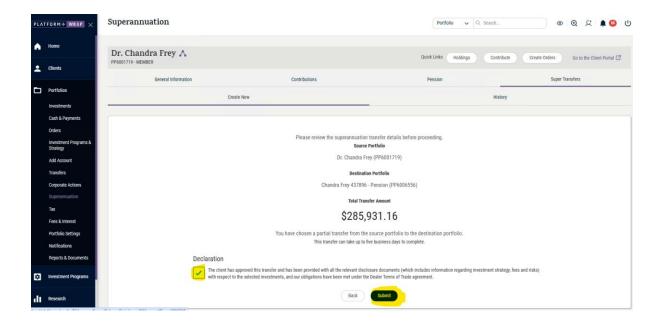


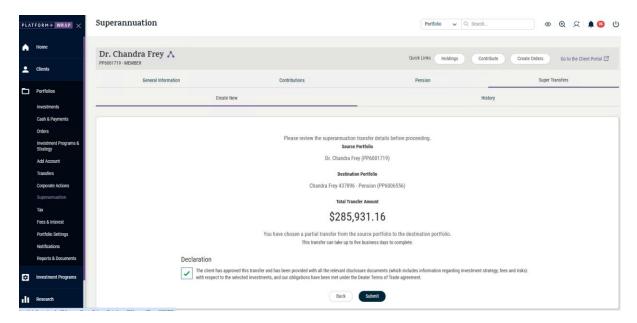
- 6. Click Exit to get back to the Super Transfer Tab
- 7. Click "Confirm Transfer Details and Review"



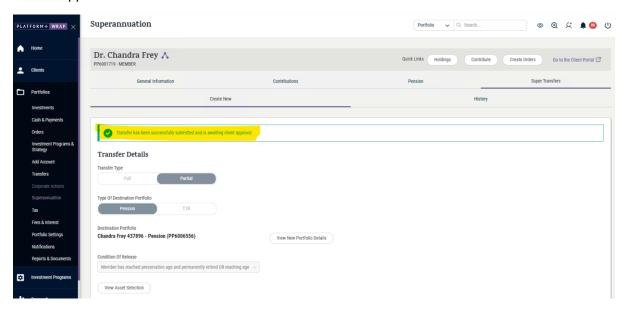


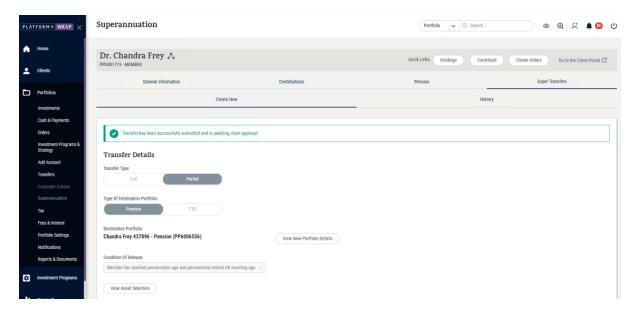
8. Review the superannuation transfer details on the screen before ticking the declaration and clicking the submit button.





9. Once submitted you will be taken back to Super Transfer screen which will include a green tick and message stating "Transfer has been successfully submitted and is awaiting client approval".





Once submitted the client will be notified, and this will be reviewed and authorised by logging into their WRAP client portal.