

Conversion <https://platformpluswrap.com.au/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

The screenshot shows the Platformplus WRAP interface for a client named Dr. Chandra Frey. The left-hand menu is open, and 'Superannuation' is selected. The top navigation bar includes 'Portfolio', a search bar, and several icons. The main content area is titled 'Superannuation' and has tabs for 'General Information', 'Contributions', 'Pension', and 'Super Transfer' (which is highlighted). Below these tabs are 'Create New' and 'History' buttons. The 'Transfer Details' section contains two radio button groups: 'Transfer Type' with options 'Full' and 'Partial', and 'Type Of Destination Portfolio' with options 'Pension' and 'TTR'. A 'Save Progress' button is located at the bottom right of the form.

This screenshot is identical to the one above, showing the Platformplus WRAP interface for a client named Dr. Chandra Frey. The left-hand menu is open, and 'Superannuation' is selected. The top navigation bar includes 'Portfolio', a search bar, and several icons. The main content area is titled 'Superannuation' and has tabs for 'General Information', 'Contributions', 'Pension', and 'Super Transfer' (which is highlighted). Below these tabs are 'Create New' and 'History' buttons. The 'Transfer Details' section contains two radio button groups: 'Transfer Type' with options 'Full' and 'Partial', and 'Type Of Destination Portfolio' with options 'Pension' and 'TTR'. A 'Save Progress' button is located at the bottom right of the form.

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
 - i. 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

The image displays two identical screenshots of the Platform Plus Wrap Superannuation web application. The interface is for a user named Dr. Chandra Frey (PP6001719 - MEMBER). The 'Super Transfers' tab is active, showing the 'Transfer Details' form. The form includes the following fields and options:

- Transfer Type:** Radio buttons for 'Full' and 'Partial'.
- Type Of Destination Portfolio:** Radio buttons for 'Pension' and 'TTR'.
- Destination Portfolio:** A dropdown menu showing 'Chandra Frey 437896 - Pension (PP6006556)' with a 'View New Portfolio Details' link.
- Condition Of Release:** A dropdown menu showing 'Member has reached preservation age and permanently retired OR reaching age'.

At the bottom of the form, there are three buttons: 'Cancel Transfer', 'Save Progress', and 'Confirm Portfolio Selection and Select Assets'.

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 support@platformpluswrap.com.au for any questions or assistance.

3. Click “Confirm Transfer Details and Review”

The image displays two screenshots of a web application interface for Superannuation transfers. The interface includes a sidebar menu on the left with options like Home, Clients, Portfolios, Investments, Cash & Payments, Orders, Investment Programs & Strategy, Add Account, Transfers, Corporate Actions, Superannuation, Tax, Fees & Interest, Portfolio Settings, Notifications, Reports & Documents, and Investment Programs. The main content area is titled 'Superannuation' and shows the 'Transfer Details' step of a wizard. The wizard is for a member named 'Dr. Chandra Frey' (PP6001719 - MEMBER). The 'Transfer Details' section includes fields for 'Transfer Type' (Full/Partial), 'Type Of Destination Portfolio' (Pension/TTR), 'Destination Portfolio' (Chandra Frey 437896 - Pension (PP6006556)), and 'Condition Of Release' (Member has reached preservation age and permanently retired OR reaching age). The 'Confirm Portfolio Selection and Select Assets' button is highlighted in yellow in both screenshots.

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

PLATFORM+ WRAP

Super Transfer

Model Holdings

| Investment Name | Available To Transfer (AUD) | Amount To Transfer (AUD) | % To Transfer | Select Destination |
|-----------------------------|-----------------------------|--------------------------|---------------|--------------------|
| Alpha High Growth SMA | 321,930.28 | 193158.17 | 60.0000 | Pension |
| Alpha Index High Growth SMA | 133,110.26 | 79866.16 | 60.0000 | Pension |

Non-Model Holdings

| Investment Name | Available To Transfer (AUD) | Available Quantity | CCY | Price (Local) | Quantity To Transfer | Amount To Transfer (AUD) | % To Transfer | Select Destination |
|---|-----------------------------|--------------------|-----|---------------|----------------------|--------------------------|---------------|--------------------|
| <div> <div></div> <div>Fake Account Name</div> </div> | | | | | | | | |
| AUD Cash | 21,511.38 | 21,511.38 | AUD | 1.00 | 12906.83 | 12906.83 | 60.0000 | Pension |

Allocate Investments

Superannuation Transfers

1. Accounts

2. Documentation

3. Allocate Investments

4. Summary

Exit Without Saving

Save and Resume Later

Next step

Total Allocated

\$285931.16

PLATFORM+ WRAP

Super Transfer

Model Holdings

| Investment Name | Available To Transfer (AUD) | Amount To Transfer (AUD) | % To Transfer | Select Destination |
|-----------------------------|-----------------------------|--------------------------|---------------|--------------------|
| Alpha High Growth SMA | 321,930.28 | 193158.17 | 60.0000 | Pension |
| Alpha Index High Growth SMA | 133,110.26 | 79866.16 | 60.0000 | Pension |

Non-Model Holdings

| Investment Name | Available To Transfer (AUD) | Available Quantity | CCY | Price (Local) | Quantity To Transfer | Amount To Transfer (AUD) | % To Transfer | Select Destination |
|---|-----------------------------|--------------------|-----|---------------|----------------------|--------------------------|---------------|--------------------|
| <div> <div></div> <div>Fake Account Name</div> </div> | | | | | | | | |
| AUD Cash | 21,511.38 | 21,511.38 | AUD | 1.00 | 12906.83 | 12906.83 | 60.0000 | Pension |

Allocate Investments

Superannuation Transfers

1. Accounts

2. Documentation

3. Allocate Investments

4. Summary

Exit Without Saving

Save and Resume Later

Next step

Total Allocated

\$285931.16

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

PLATFORM+ WRAP

Super Transfer

Please review the superannuation transfer details before proceeding.

Source Portfolio

PP6001719 - Accumulation

Destination Portfolio

PP6006556 - Pension

Transfer SOA Allocated

\$285,931.16

Edit

Transfer MDA Allocated

\$0.00

Edit

Transfer Non-Advised Allocated

\$0.00

Edit

You have chosen a partial transfer from the source portfolio to the destination portfolio.

This transfer can take up to five business days to complete.

Superannuation Transfers

1. Accounts

2. Documentation

3. Allocate Investments

4. Summary

Exit and Cancel Application

Save and Resume Later

Submit

Declaration

☒ I Confirm The Following:

I declare that:

- the applicant(s) has been provided with all relevant offer documents for the platform, which includes information regarding investment strategy, fees and risks.
- the information entered is true and correct.

PLATFORM+ WRAP

Super Transfer

Please review the superannuation transfer details before proceeding.

Source Portfolio

PP6001719 - Accumulation

Destination Portfolio

PP6006556 - Pension

Transfer SOA Allocated

\$285,931.16

Edit

Transfer MDA Allocated

\$0.00

Edit

Transfer Non-Advised Allocated

\$0.00

Edit

You have chosen a partial transfer from the source portfolio to the destination portfolio.

This transfer can take up to five business days to complete.

Superannuation Transfers

1. Accounts

2. Documentation

3. Allocate Investments

4. Summary

Exit and Cancel Application

Save and Resume Later

Submit

Declaration

☒ I Confirm The Following:

I declare that:

- the applicant(s) has been provided with all relevant offer documents for the platform, which includes information regarding investment strategy, fees and risks.
- the information entered is true and correct.

- Once submitted you will get a green tick and message stating “Transfer details successfully confirmed”.

PLATFORM+ WRAP

Super Transfer

✔ Transfer details successfully confirmed.

Please review the superannuation transfer details before proceeding.

Source Portfolio
PP6001719 - Accumulation

Destination Portfolio
PP6006556 - Pension

Transfer SOA Allocated
\$285,931.16

Transfer MDA Allocated
\$0.00

Transfer Non-Advised Allocated
\$0.00

You have chosen a partial transfer from the source portfolio to the destination portfolio.

This transfer can take up to five business days to complete.

Superannuation Transfers

1. Accounts

2. Documentation

3. Allocate Investments

4. Summary

Exit

PLATFORM+ WRAP

Super Transfer

✔ Transfer details successfully confirmed.

Please review the superannuation transfer details before proceeding.

Source Portfolio
PP6001719 - Accumulation

Destination Portfolio
PP6006556 - Pension

Transfer SOA Allocated
\$285,931.16

Transfer MDA Allocated
\$0.00

Transfer Non-Advised Allocated
\$0.00

You have chosen a partial transfer from the source portfolio to the destination portfolio.

This transfer can take up to five business days to complete.

Superannuation Transfers

1. Accounts

2. Documentation

3. Allocate Investments

4. Summary

Exit

6. Click Exit to get back to the Super Transfer Tab

7. Click “Confirm Transfer Details and Review”

PLATFORM+ WRAP

Superannuation

Home

Clients

Portfolios

Investments

Cash & Payments

Orders

Investment Programs & Strategy

Add Account

Transfers

Corporate Actions

Superannuation

Tax

Fees & Interest

Portfolio Settings

Notifications

Reports & Documents

Investment Programs

Dr. Chandra Frey

PP6001719 - MEMBER

Quick Links

Holdings

Contribute

Create Orders

Go to the Client Portal

General Information

Contributions

Pension

Super Transfers

Create New

History

Transfer Details

Transfer Type

Full

Partial

Type Of Destination Portfolio

Pension

TTR

Destination Portfolio

Chandra Frey 437896 - Pension (PP6006556)

View New Portfolio Details

Condition Of Release

Member has reached preservation age and permanently retired OR reaching age

Cancel Transfer

Save Progress

Confirm Portfolio Selection and Select Assets

PLATFORM+ WRAP

Home

Clients

Portfolios

Investments

Cash & Payments

Orders

Investment Programs & Strategy

Add Account

Transfers

Corporate Actions

Superannuation

Tax

Fees & Interest

Portfolio Settings

Notifications

Reports & Documents

Investment Programs

Superannuation

Portfolio

Search...

Dr. Chandra Frey

PP6001719 - MEMBER

Quick Links

Holdings

Contribute

Create Orders

Go to the Client Portal

General Information

Contributions

Pension

Super Transfers

Create New

History

Transfer Details

Transfer Type

Full

Partial

Type Of Destination Portfolio

Pension

TTR

Destination Portfolio

Chandra Frey 437896 - Pension (PP6006556)

View New Portfolio Details

Condition Of Release

Member has reached preservation age and permanently retired OR reaching age

Cancel Transfer

Save Progress

Confirm Portfolio Selection and Select Assets

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

PLATFORM+ WRAP

Home

Clients

Portfolios

Investments

Cash & Payments

Orders

Investment Programs & Strategy

Add Account

Transfers

Corporate Actions

Superannuation

Tax

Fees & Interest

Portfolio Settings

Notifications

Reports & Documents

Investment Programs

Research

Superannuation

Portfolio

Search...

Dr. Chandra Frey

PP6001719 - MEMBER

Quick Links

Holdings

Contribute

Create Orders

Go to the Client Portal

General Information

Contributions

Pension

Super Transfers

Create New

History

Please review the superannuation transfer details before proceeding.

Source Portfolio

Dr. Chandra Frey (PP6001719)

Destination Portfolio

Chandra Frey 437896 - Pension (PP6006556)

Total Transfer Amount

\$285,931.16

You have chosen a partial transfer from the source portfolio to the destination portfolio.

This transfer can take up to five business days to complete.

Declaration

☒

The client has approved this transfer and has been provided with all the relevant disclosure documents (which includes information regarding investment strategy, fees and risks) with respect to the selected investments, and our obligations have been met under the Dealer Terms of Trade agreement.

Back

Submit

PLATFORM WRAP

Home

Clients

Portfolios

Investments

Cash & Payments

Orders

Investment Programs & Strategy

Add Account

Transfers

Corporate Actions

Superannuation

Tax

Fees & Interest

Portfolio Settings

Notifications

Reports & Documents

Investment Programs

Research

Superannuation

Portfolio

Q Search...

Dr. Chandra Frey

PP6001719 - MEMBER

Quick Links

Holdings

Contribute

Create Orders

Go to the Client Portal

General Information

Contributions

Pension

Super Transfers

Create New

History

Please review the superannuation transfer details before proceeding.

Source Portfolio

Dr. Chandra Frey (PP6001719)

Destination Portfolio

Chandra Frey 437896 - Pension (PP6006556)

Total Transfer Amount

\$285,931.16

You have chosen a partial transfer from the source portfolio to the destination portfolio.

This transfer can take up to five business days to complete.

Declaration

☒

The client has approved this transfer and has been provided with all the relevant disclosure documents (which includes information regarding investment strategy, fees and risks) with respect to the selected investments, and our obligations have been met under the Dealer Terms of Trade agreement.

Back

Submit

- 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".

PLATFORM WRAP

Home

Clients

Portfolios

Investments

Cash & Payments

Orders

Investment Programs & Strategy

Add Account

Transfers

Corporate Actions

Superannuation

Tax

Fees & Interest

Portfolio Settings

Notifications

Reports & Documents

Investment Programs

Research

Superannuation

Portfolio

Q Search...

Dr. Chandra Frey

PP6001719 - MEMBER

Quick Links

Holdings

Contribute

Create Orders

Go to the Client Portal

General Information

Contributions

Pension

Super Transfers

Create New

History

☒

Transfer has been successfully submitted and is awaiting client approval

Transfer Details

Transfer Type

Full

Partial

Type Of Destination Portfolio

Pension

TTR

Destination Portfolio

Chandra Frey 437896 - Pension (PP6006556)

View New Portfolio Details

Condition Of Release

Member has reached preservation age and permanently retired OR reaching age

View Asset Selection

PLATFORM+ WRAP

Home

Clients

Portfolios

Investments

Cash & Payments

Orders

Investment Programs & Strategy

Add Account

Transfers

Corporate Actions

Superannuation

Tax

Fees & Interest

Portfolio Settings

Notifications

Reports & Documents

Investment Programs

Superannuation

Portfolio

Q Search...

🔗 🔍 ⚙️ 🔔 🔌

Dr. Chandra Frey

PP6001719 - MEMBER

Quick Links

Holdings

Contribute

Create Orders

Go to the Client Portal

General Information

Contributions

Pension

Super Transfers

Create New

History

✔️ Transfer has been successfully submitted and is awaiting client approval

Transfer Details

Transfer Type

Full

Partial

Type Of Destination Portfolio

Pension

TTR

Destination Portfolio

Chandra Frey 437896 - Pension (PP6006556)

View New Portfolio Details

Condition Of Release

Member has reached preservation age and permanently retired OR reaching age

View Asset Selection

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