



Conversion Guide:

Full conversion from Superannuation to Pension.

This guide is to be used for the process of converting 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 'Superannuation' page for a client named Dr. Chandra Frey. The 'Super Transfers' tab is selected in the top navigation bar. The 'Transfer Details' section is visible, showing options for 'Transfer Type' (Full, Partial) and 'Type Of Destination Portfolio' (Pension, 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
 - 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 screenshot shows the 'Superannuation' section for member Dr. Chandra Frey. The 'Transfer Details' form is partially filled: 'Transfer Type' is set to 'Partial', 'Type Of Destination Portfolio' is 'Pension', and the 'Destination Portfolio' is 'Chandra Frey 437896 - Pension (PP6006553)'. The 'Condition Of Release' is set to 'Member has reached preservation age and permanently retired OR reaching age'. At the bottom right, the 'Confirm Transfer Details and Review' button is highlighted with a purple box.

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"

This screenshot is similar to the first one but shows the 'Transfer Type' set to 'Full'. The 'Destination Portfolio' is now 'Chandra Frey 437896 - Pension (PP6006553)'. The 'Confirm Transfer Details and Review' button at the bottom right is highlighted with a purple box.



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

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 (PP6006553)

Total Transfer Amount
\$476,551.92

You have chosen a full 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".

Dr. Chandra Frey PP6001719 - MEMBER

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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 (PP6006551) [View New Portfolio Details](#)

Condition Of Release
Member has reached preservation age and permanently retired OR reaching age

[Cancel Transfer](#)



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