



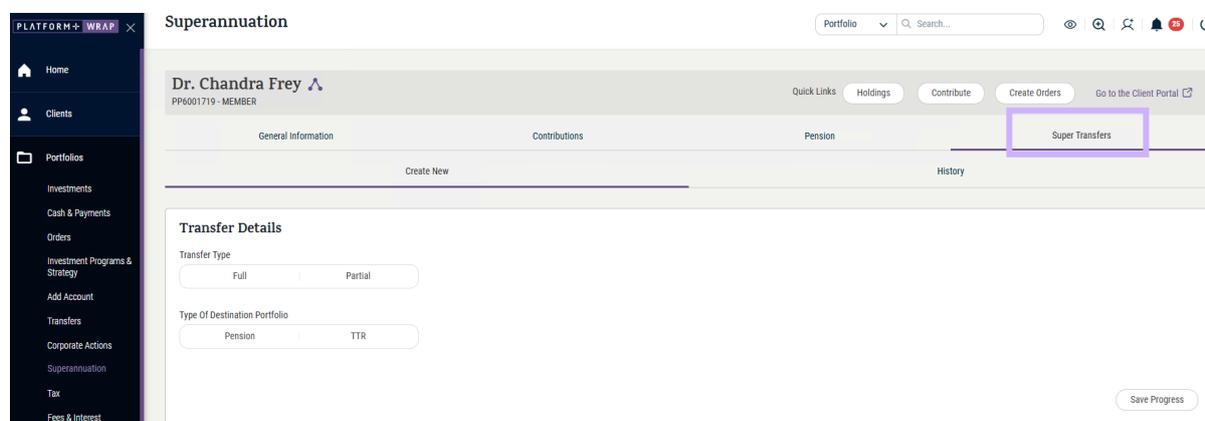
## Conversion Guide:

### 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
    - 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



**Superannuation**

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 437890 - Pension (PP6006556)** | View New Portfolio Details

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

Buttons: Cancel Transfer, Save Progress, **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](mailto:support@platformpluswrap.com.au) for any questions or assistance.

### 3. Click “Confirm Transfer Details and Review”

**Superannuation**

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

Buttons: Cancel Transfer, Save Progress, **Confirm Portfolio Selection and Select Assets**



**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       | 321,990.28                  | 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 |
|---------------------|-----------------------------|--------------------|-----|---------------|----------------------|--------------------------|---------------|--------------------|
| ⊖ Fake Account Name |                             |                    |     |               |                      |                          |               |                    |
| 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<br><b>\$285,931.16</b><br><small>Edit</small> | Transfer MDA Allocated<br><b>\$0.00</b><br><small>Edit</small> | Transfer Non-Advised Allocated<br><b>\$0.00</b><br><small>Edit</small> |
|--|--|--|

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**

**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”.

**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 | Transfer MDA Allocated | Transfer Non-Advised Allocated |
| \$285,931.16           | \$0.00                 | \$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**

- Accounts
- Documentation
- Allocate Investments
- Summary**

Exit

- Click Exit to get back to the Super Transfer Tab

- Click “Confirm Transfer Details and Review”

**Superannuation**

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

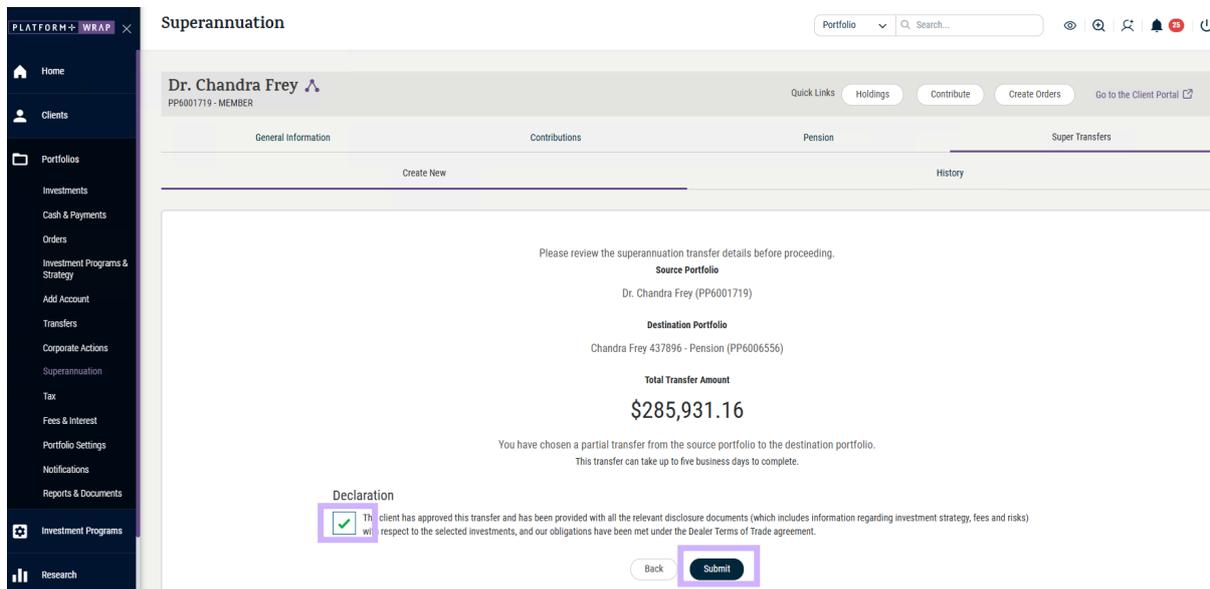
Type Of Destination Portfolio:  Pension  TTR

Destination Portfolio: **Chandra Frey 437896 - Pension (PP6006556)** [View New Portfolio Details](#)

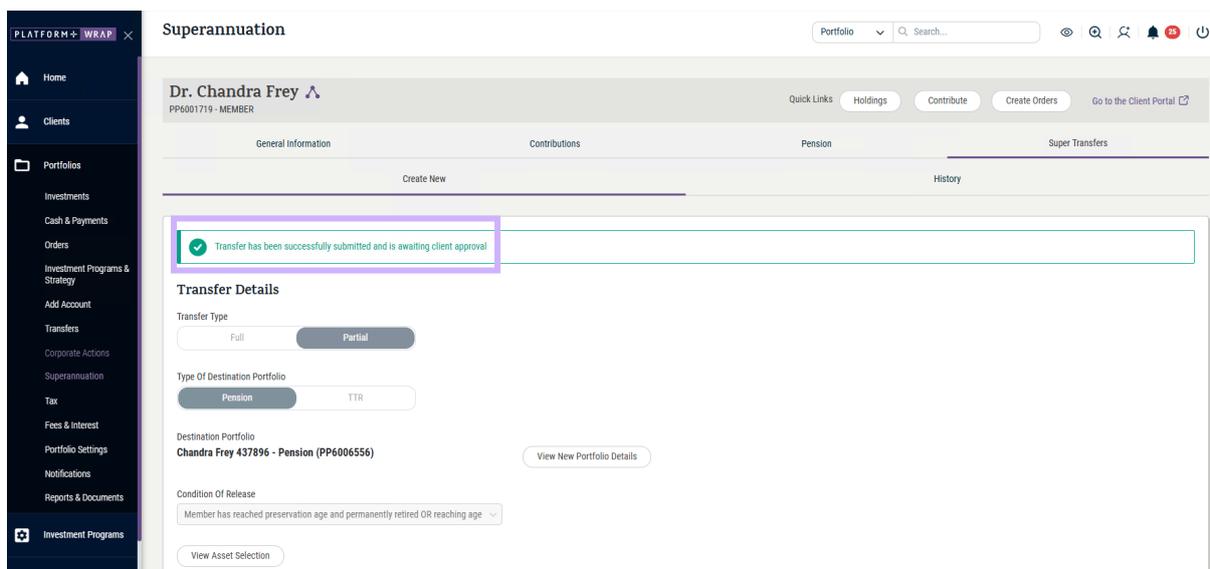
Condition Of Release:



**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.