smartMonday Adviser Portal

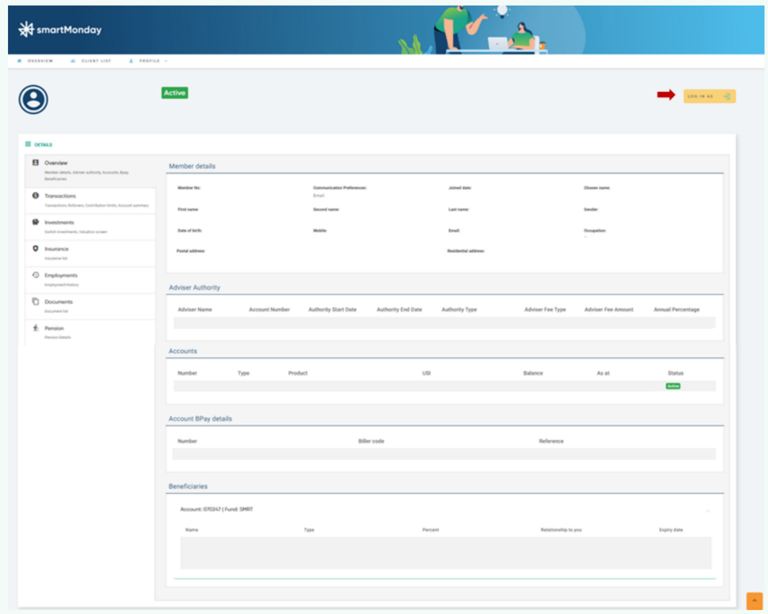
Transaction guide

About this guide

This guide provides an overview of the transactions an adviser can make on behalf of a client where they have an Authority in place to Act upon a smartMonday member's account.

Logging into your client’s account

Step 1

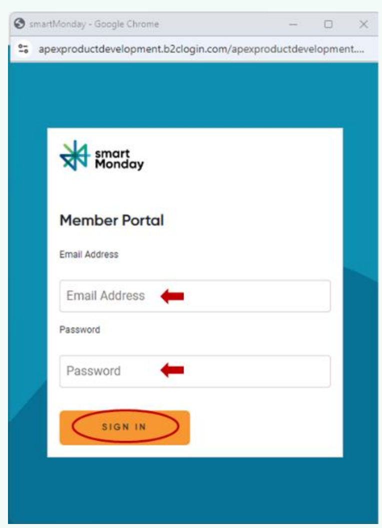


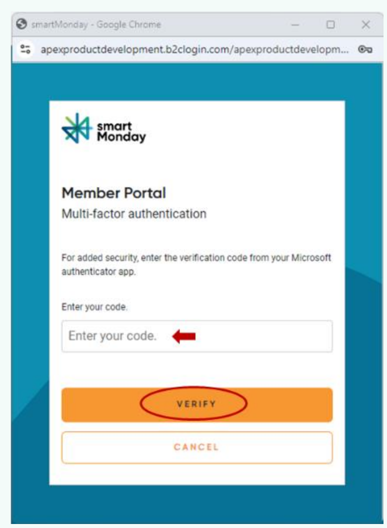
The smartMonday Adviser Portal will allow you to act on behalf of your client where you have an Authority in place to Act upon a smartMonday member’s account.

If this Authority is in place the ‘Log In As’ button will become available for that client’s account. On the overview page, “Authority for Adviser to Act” will be shown in the Adviser Authority record field.

When you select the ‘Log In As’ button, a window will open to take you to the Member’s Portal account.

Step 2





You will then be prompted to add your Adviser Login details (Adviser Email Address, Password and Authentication Code from your Authenticator App).

Note: this is your Adviser Portal login details not the member’s credentials.

The Member Portal instance for the chosen member will be opened and the following actions can be carried out.

Please note, updates made to your client’s account, and requests submitted, will be visible immediately in the Member and Adviser Portals.

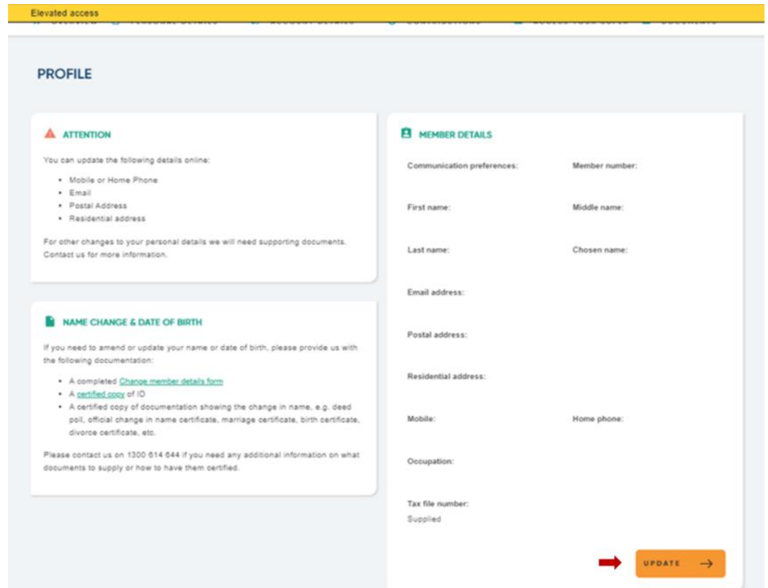
Actions you can complete

Update Member Details

Go to Personal Details > Update Your Details.

The screen can be edited by selecting the 'Update' button. The following details can be updated on behalf of your client.

- Email address
- Chosen name
- Mobile
- Home phone
- Occupation
- Postal address
- Residential address

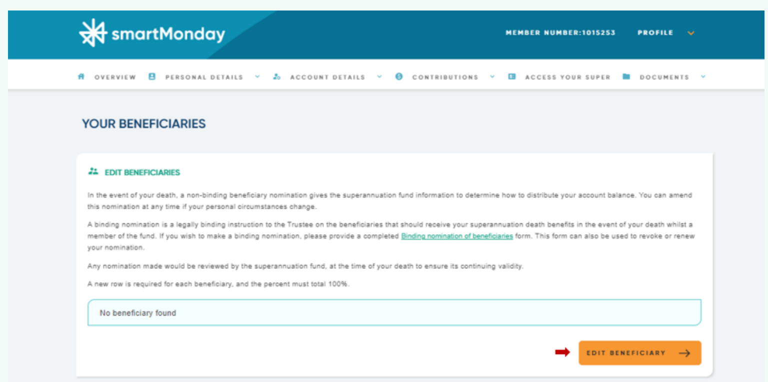


Update Preferred Beneficiaries

Go to Personal Details > Beneficiaries

If your client has not provided details of Binding Beneficiaries for their smartMonday account, you can edit or add their Preferred Beneficiaries. If beneficiaries are able to be added or edited the orange Edit button will appear.

Please note, beneficiaries must total 100% before the data can be saved.



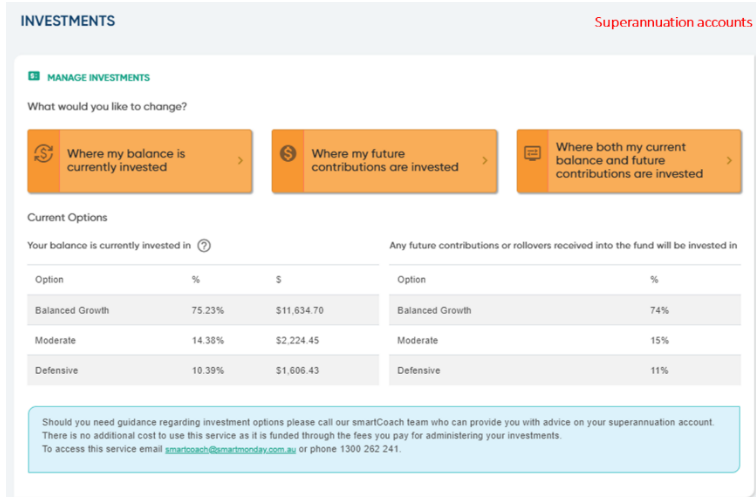
Manage Investments/Submit a Switch Request

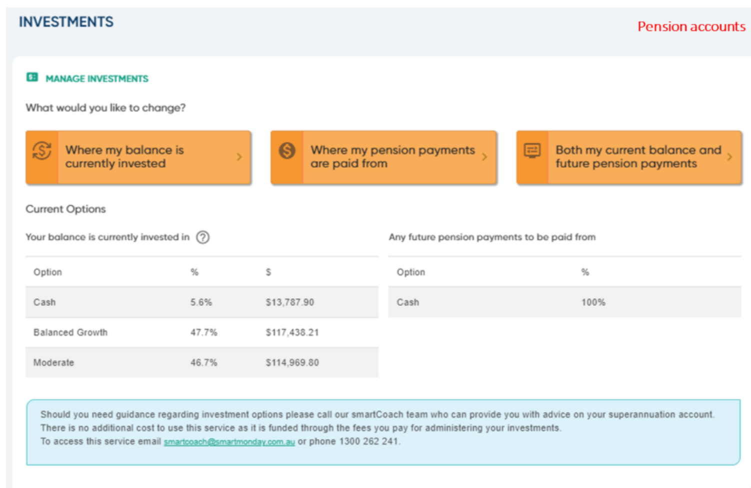
Go to Account Details > Manage Investments from the menu bar at the top of the page or select the 'Manage Investments' button on the overview page to make updates to investments.

For superannuation accounts, the Current Balance, Future Contribution Profile or both can be actioned from this screen. Once a request to switch the Current Balance is added, the Current Balance will display a 'Pending Request' banner, and only changes to the Future Contributions can be actioned until the switch has been processed.

For Pension and TTR accounts the Current Balance, Pension Payment Profile or both can be actioned from this screen. Once a request to switch the Current Balance is added, the Current Balance will display a 'Pending Request' banner, and only changes to the Pension payments can be actioned until the switch has been processed.

Please note, validations are in place to ensure that the investment options where pension payments are made from match the member's current balance for the options they have a pending switch into.





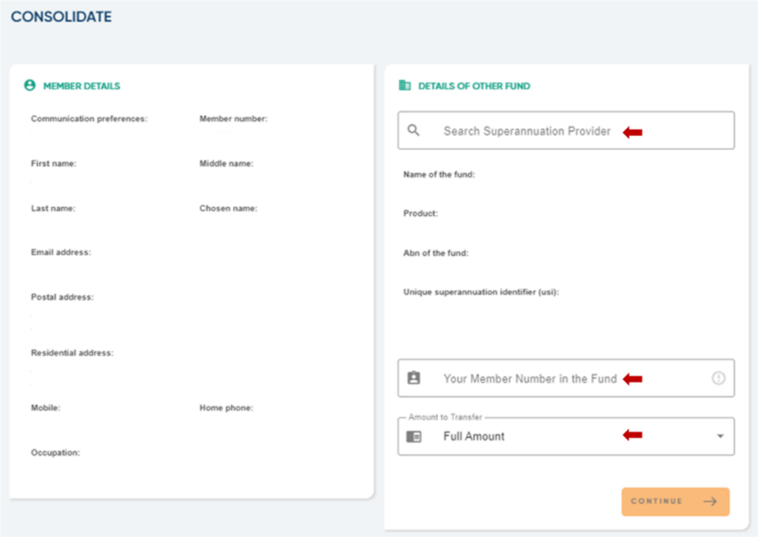
Request a rollover in from another super fund - superannuation only

Go to Contributions > Consolidate your super from the menu bar or go to the Consolidate Your Super section at the bottom of the overview page to request a rollover.

The search box can be used to search for the other fund by Fund Name or USI, a listing of matching funds will be returned.

The Member Number at the other fund needs to be added and either Full or Partial amount selected (selecting partial amount will allow you to enter the chosen amount). Selecting continue will return a confirmation screen.

Selecting Confirm will send the request to SuperStream immediately.



Other features and notes

- You can vary Pension payment amounts for your clients who have a smartMonday pension account.
- You cannot submit a benefit payment request or claim a tax deduction on behalf of your client through the portal.
- If your client has a Benefit Block on their account, the 'Log In As' button will not be available.

Got questions?

For **questions about the Adviser Portal and member accounts**, please call the smartMonday contact centre on 1300 614 644 from 8.30am to 5.00pm (AEST/AEDT), Monday to Friday or email adviser@smartmonday.com.au.

Prepared by smartMonday Solutions Limited ABN 48 002 288 646, AFSL 236667, the sponsor of the Smart Future Trust ABN 68 964 712 340 RSE Registration No R1000566.