

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.

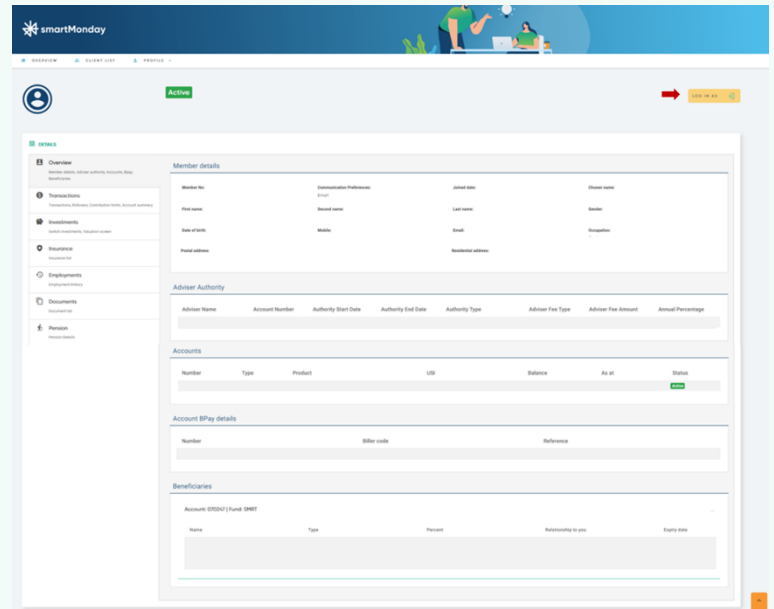
Logging into your client's account

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.



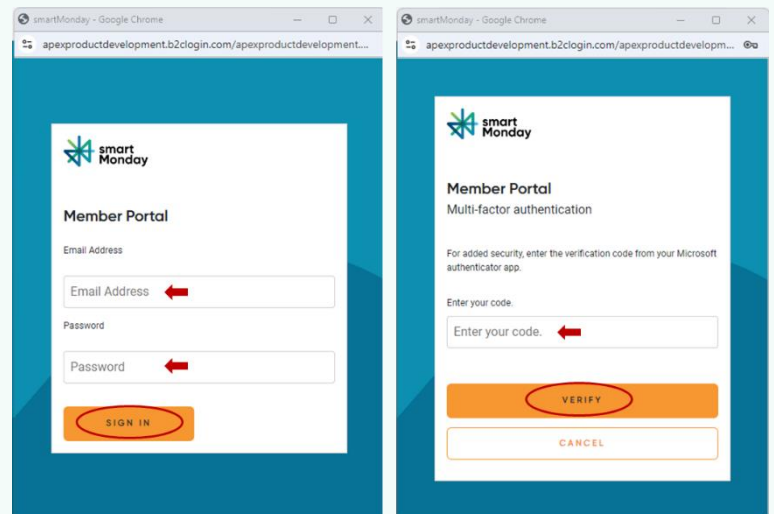
Step 2

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.



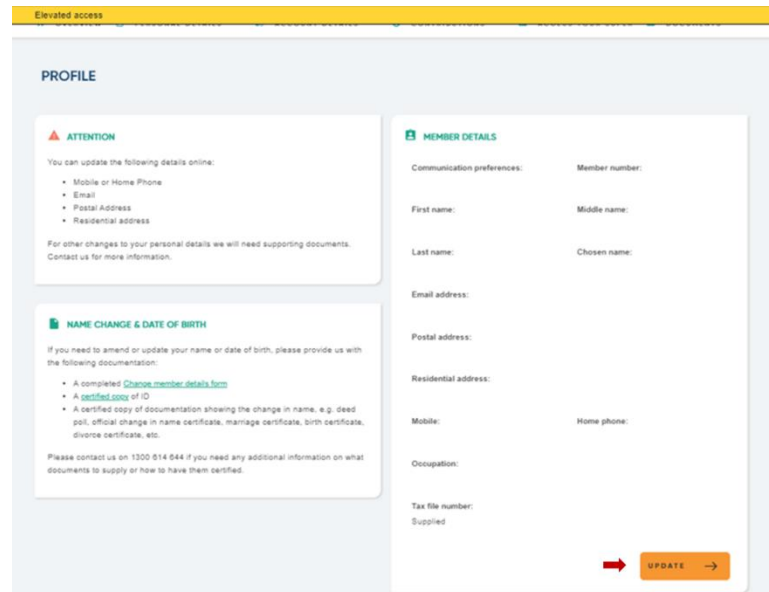
Actions you can complete

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



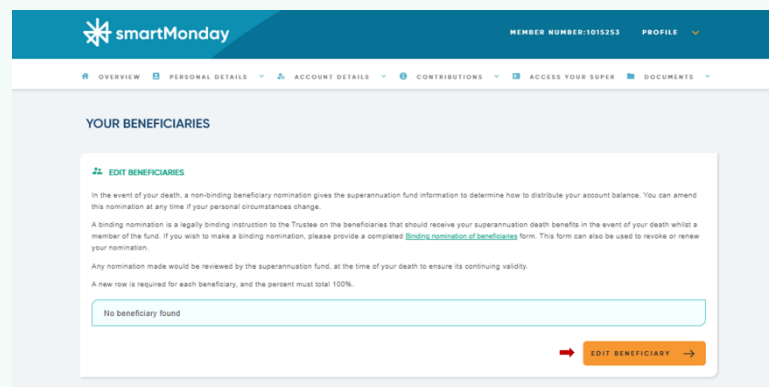
The screenshot shows the 'Update Member Details' form. It has a yellow header bar with 'Elevated access'. The main content area is titled 'PROFILE'. On the left, there are two informational boxes: 'ATTENTION' (listing details that can be updated online like Mobile or Home Phone, Email, Postal Address, and Residential address) and 'NAME CHANGE & DATE OF BIRTH' (listing required documentation for name or birth date changes). On the right, the 'MEMBER DETAILS' form is displayed with fields for Communication preferences, Member number, First name, Middle name, Last name, Chosen name, Email address, Postal address, Residential address, Mobile, Home phone, Occupation, and Tax file number. An orange 'UPDATE' button with a right arrow is at the bottom right.

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.



The screenshot shows the 'Update Preferred Beneficiaries' form. The top navigation bar includes the smartMonday logo, 'MEMBER NUMBER: 1015253', and a 'PROFILE' dropdown. Below this is a menu bar with 'OVERVIEW', 'PERSONAL DETAILS', 'ACCOUNT DETAILS', 'CONTRIBUTIONS', 'ACCESS YOUR SUPER', and 'DOCUMENTS'. The main content area is titled 'YOUR BENEFICIARIES'. It contains an 'EDIT BENEFICIARIES' section with explanatory text about beneficiary nominations. A text box below the text says 'No beneficiary found'. An orange 'EDIT BENEFICIARY' button with a right arrow is at the bottom right.

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.

INVESTMENTS
Superannuation accounts

MANAGE INVESTMENTS

What would you like to change?

Where my balance is currently invested

Where my future contributions are invested

Where both my current balance and future contributions are invested

Current Options

Your balance is currently invested in ⓘ

Option	%	\$
Balanced Growth	75.23%	\$11,634.70
Moderate	14.38%	\$2,224.45
Defensive	10.39%	\$1,666.43

Any future contributions or rollovers received into the fund will be invested in

Option	%
Balanced Growth	74%
Moderate	15%
Defensive	11%

Should you need guidance regarding investment options please call our smartCoach team who can provide you with advice on your superannuation account. There is no additional cost to use this service as it is funded through the fees you pay for administering your investments. To access this service email smartcoach@smartmonday.com.au or phone 1300 262 241.

INVESTMENTS
Pension accounts

MANAGE INVESTMENTS

What would you like to change?

Where my balance is currently invested

Where my pension payments are paid from

Both my current balance and future pension payments

Current Options

Your balance is currently invested in ⓘ

Option	%	\$
Cash	5.6%	\$13,787.90
Balanced Growth	47.7%	\$117,438.21
Moderate	46.7%	\$114,969.80

Any future pension payments to be paid from

Option	%
Cash	100%

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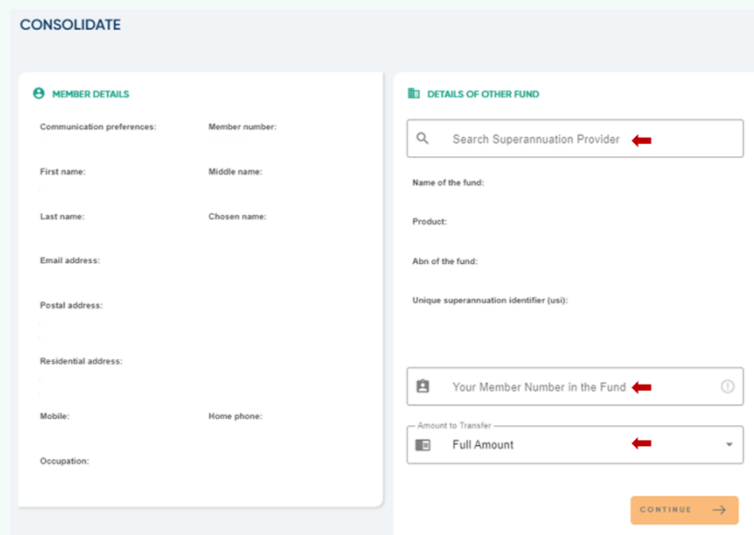
Request a rollover in from another super fund - superannuation only

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.



The screenshot shows a web form titled "CONSOLIDATE". It is divided into two main sections: "MEMBER DETAILS" and "DETAILS OF OTHER FUND".

MEMBER DETAILS: This section contains several input fields: "Communication preferences:", "Member number:", "First name:", "Middle name:", "Last name:", "Chosen name:", "Email address:", "Postal address:", "Residential address:", "Mobile:", "Home phone:", and "Occupation:".

DETAILS OF OTHER FUND: This section includes a search bar labeled "Search Superannuation Provider" with a red arrow pointing left. Below it are fields for "Name of the fund:", "Product:", "Abn of the fund:", and "Unique superannuation identifier (usi):". There is also a field for "Your Member Number in the Fund" with a red arrow pointing left and a dropdown menu for "Amount to Transfer" set to "Full Amount" with a red arrow pointing left. At the bottom right of this section is an orange button labeled "CONTINUE" with a right-pointing arrow.

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.