SETTING UP YOUR CLIENT'S ACCOUNT
QUICK START GUIDE

This guide will take you through the account setup process, outline the forms required, and how to submit them to our team for processing. For a step-by-step walkthrough of the process watch our **instructional video**.

- Once you've logged into the platform you'll need to select **Accounts** - **Applications**. This will take you to the account set up screen.
- Select the adviser name, the product, and click **Create New Application**. The system will take you through a step-by-step application process.
- When entering the client's member details, make sure that the **residential address**, **email** and **phone number** provided belong to the client (you aren't able to use the adviser or practice's contact details) and match the details provided on the FATCA form or ID documents.
- In the contributions section you can enter contribution details for the client and their spouse, along with any additional or one-off contributions.
- Contribution, ongoing or one-off advice fees can be entered in the **Fees** section. Please refer to the PDS for Licensee fees.
- Any requested rollovers will be processed by our team once the account has been activated.
- When nominating beneficiaries, make sure the allocation adds up to 100%. It's also important for the clients and witnesses to signed the forms on the same day. Binding Death Beneficiary forms are available under the **Products & Forms - Forms** tab in AdviserHUB.
- Once the application is complete, log into **SupportHUB** and attach the signed to a new SupportHUB request, along with the required identification documents. You can track your request in the **My Requests** section of SupportHUB.

Identification
For IDPS clients, you'll need to include the FATCA form with the application. For super or pension clients, you can provide the FATCA form or a scanned certified copy of their ID.

Fees
Please refer to the PDS for all associated fees.

For more information contact your BDM or submit an enquiry through SupportHUB.