

Perpetual Adviser Online Portal Super and Pension User Guide

November 2025

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Disclaimer:

The information in this user guide is to provide general guidance on using Perpetual Adviser portal. No information in this user guide should be treated as any form of legal, financial or any other advice under any circumstances. Perpetual may alter or update the information contained in this user guide without notice.

Please note fictitious names are used for investor and adviser or any other identifying features in making of this guide. Any resemblance to real persons is coincidental.

1 PORTAL REGISTRATION

- a. Access the Adviser Online portal URL below for the relevant Perpetual product:

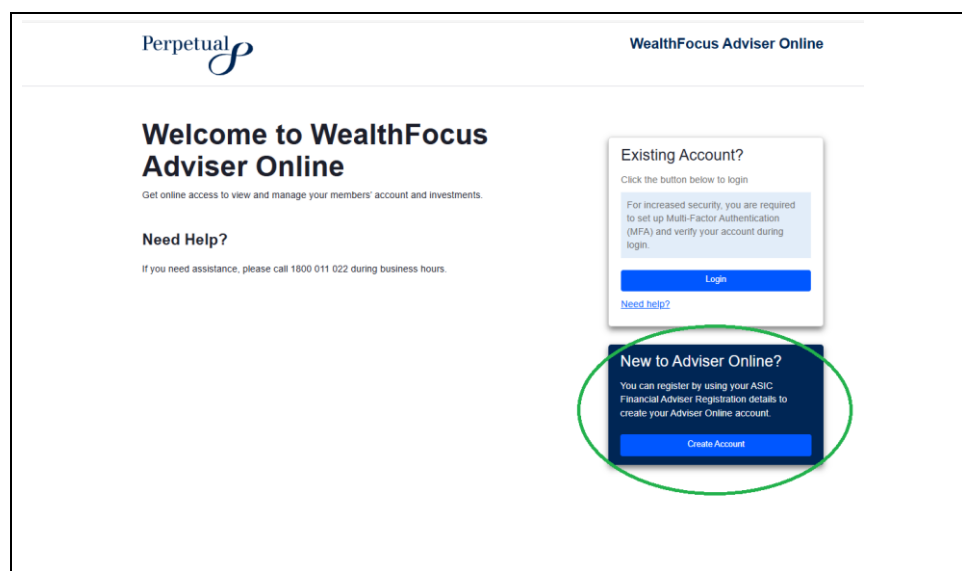
WealthFocus Super & Pension

<https://adviser.aas.com.au/login/Pw>

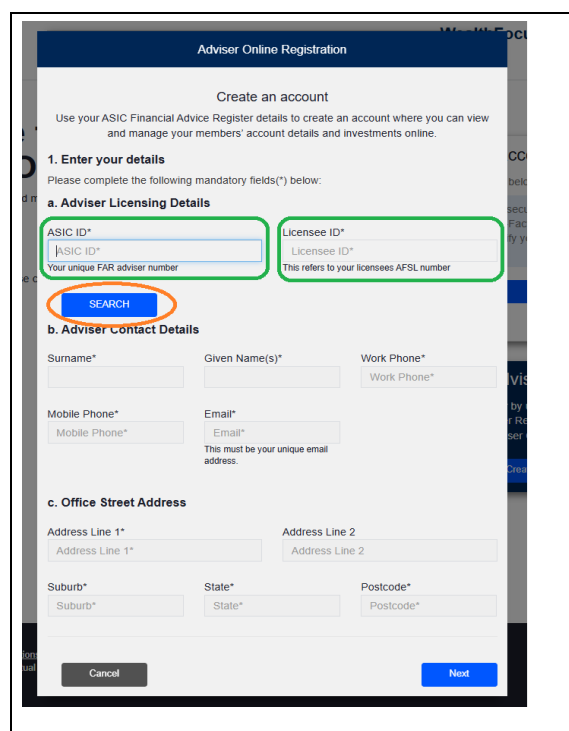
Select Super & Pension

<https://adviser.aas.com.au/login/Pk>

- b. On the logon page, click on “Create Account”



- c. You will be prompted to enter your ASIC Adviser ID (FAR Adviser ID) & your licensee's AFSL number. The system will validate these IDs against the ASIC database.



- d. If you encounter an error message, please recheck your license numbers and try again. Note the adviser and licensee must be current on the ASIC Financial Advice Register. Please contact us if you require further assistance. Please refer to the “Support and Troubleshooting” section for the relevant contact details

The screenshot shows the 'Adviser Online Registration' page with the heading 'Create an account'. Below the heading, it says 'Use your ASIC Financial Advice Register details to create an account where you can view and manage your members' account details and investments online.' A red-bordered box contains the following text: 'Please correct the following errors', 'There's been an error. Please contact our Adviser Services team on 1800 011 022 during business hours for further assistance.' Below this, the form is divided into sections. Section '1. Enter your details' asks the user to complete mandatory fields. Section 'a. Adviser Licensing Details' contains two input fields: 'ASIC ID*' with the value '000277811' and 'Licensee ID*' with the value '000522811'. Below these fields are the labels 'Your unique FAR adviser number' and 'This refers to your licensee's AFSL number' respectively.

- e. Upon successful validation, some of your details will be auto populated in the registration form. Please complete the remaining fields eg. Mobile phone, Email etc. and click Next.

The screenshot shows the 'Adviser Online Registration' page with the heading 'Create an account'. Below the heading, it says 'Use your ASIC Financial Advice Register details to create an account where you can view and manage your members' account details and investments online.' A green-bordered box contains the following text: 'We've found your details. Please complete the information below to register an account. Does Something look wrong?'. Below this, the form is divided into sections. Section '1. Enter your details' asks the user to complete mandatory fields. Section 'a. Adviser Licensing Details' contains two input fields: 'ASIC ID*' with the value '000277888' and 'Licensee ID*' with the value '000522888'. Below these fields are the labels 'Your unique FAR adviser number' and 'This refers to your licensee's AFSL number' respectively. A blue 'SEARCH' button is located below section 'a'. Section 'b. Adviser Contact Details' contains three input fields: 'Surname*' with the value 'JACKSON', 'Given Name(s)*' with the value 'JOHN', and 'Work Phone*'. Below these fields are the labels 'Surname*', 'Given Name(s)*', and 'Work Phone*'. Section 'c. Office Street Address' contains three input fields: 'Address Line 1*' with the value 'Address Line 1*', 'Address Line 2' with the value 'Address Line 2', and 'Suburb*' with the value 'Suburb*'. Below these fields are the labels 'Address Line 1*', 'Address Line 2', and 'Suburb*'. At the bottom of the form are two buttons: 'Cancel' and 'Next'.

- f. You will be prompted to nominate a password, then click on Complete.

The screenshot shows the 'Adviser Online Registration' page with the 'Create an account' section. It includes a 'Password' field with a 'Strong' indicator, a 'Confirm Password' field, and a list of password requirements. A green box highlights the 'Complete' button at the bottom right.

Adviser Online Registration

Create an account

Password

Password: [masked] Strong ⓘ

Confirm Password: [masked]

Must be a minimum of 10 characters

- Must contain at least one uppercase letter
- Must contain at least one lowercase letter
- Must contain at least one number
- Must contain at least one special character
- Password must be entered twice
- Cannot be any of your last 10 passwords

I have read and accepted the [Terms & Conditions](#) for access to Adviser Online.

If you need assistance, please call 1800 011 022 during business hours.

Need Help?

- g. Click on Confirm and an automated email will be sent to your nominated email address containing your Adviser login ID and next step complete the online registration.

The screenshot shows the 'Adviser Online Registration' page with the 'Create an account' section. It displays a confirmation message stating that the account has been created and provides instructions for confirming the account via email. A green box highlights the 'Confirm' button at the bottom right.

Adviser Online Registration

Create an account

Your account has been created.

Next step is to confirm your email address, your Adviser ID will be included in the email. You will need this number to log into Adviser Online.

We've sent a confirmation email to david.bowman-wall@linkgroup.com

Please check your email to confirm your account.

If you don't receive an email within 30 minutes, please call 1800 011 022 during business hours.

- h. Access the email received and click on the verification link within the email to proceed with the registration process. Note your Adviser ID is also your login ID for the Adviser portal.

The screenshot shows an email from Perpetual WealthFocus. The subject is 'Perpetual WealthFocus Adviser Online confirm your registration'. The email addresses JOHN and thanks him for registering. It provides a link to activate the account and states that the Adviser ID/Login ID is 283656, which is circled in green. It also includes contact information for assistance.

Subject: Perpetual WealthFocus Adviser Online confirm your registration

Dear JOHN,

Thank you for registering for Adviser Online. Please click on the link below to activate your account:

<https://adviserportal-uat.orientsys.com.au/login/PW/confirmRegistration/cc0ff294-12d1-46f4-8156-55d442e0e1b6>

Your Adviser ID/ Login ID is 283656

If you believe this may be unauthorised access or did not initiate this change, please contact us immediately.

If you need assistance, please call 1800 011 022 during business hours.

Kind Regards,

Perpetual WealthFocus

- i. Your Adviser ID has been registered successfully. Click Confirm.

Perpetual *P* WealthFocus Adviser Online

Confirm Registration

Your Adviser ID has been registered successfully.

[Confirm](#)

- j. You will be redirected back to the Adviser portal login screen. Click on “Login” and enter your login credentials which will be your Adviser ID as noted in the registration email and password nominated in step (f) above.

Perpetual *P* WealthFocus Adviser Online

Welcome to WealthFocus Adviser Online

Get online access to view and manage your members' account and investments.

Need Help?
If you need assistance, please call 1800 011 022 during business hours.

Existing Account?
Click the button below to login

For increased security, you are required to set up Multi-Factor Authentication (MFA) and verify your account during login.

[Login](#)

[Need Help?](#)

Connecting to Sign in with your account to access adviser web app and adviser impersonation

okta

Sign In

Username
283656

Password

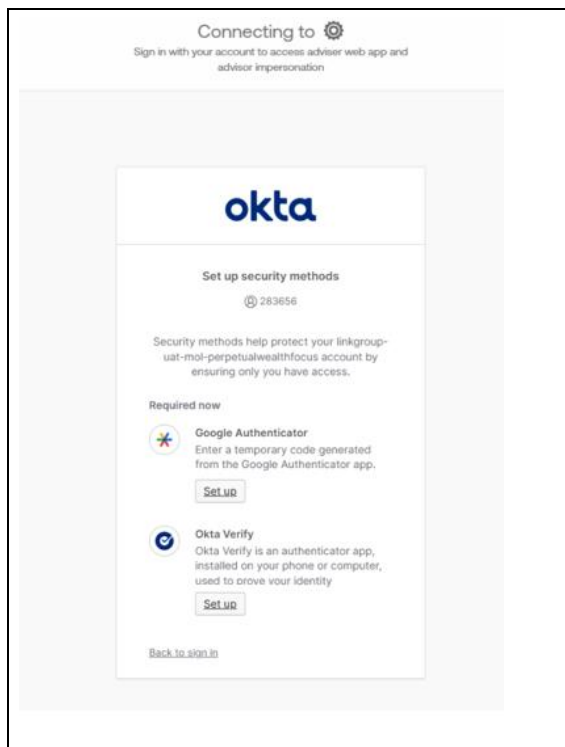
☐ Keep me signed in

[Forgot password?](#)

[Hello](#)

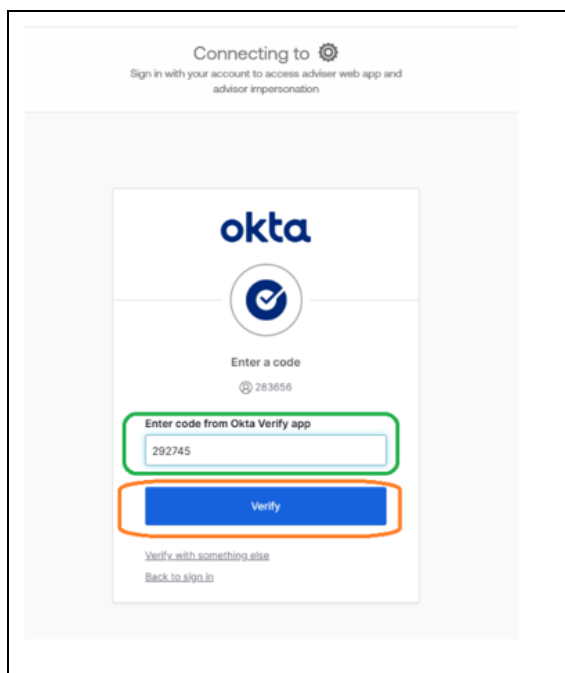
[Sign In](#)

- k. Select your preferred security method and follow the prompts to complete the MFA set up.



- l. Once MFA set-up is done, click Continue and you will be redirected back to the logon page. MFA is now enabled for all subsequent logins to the portal.

Example of OKTA authentication



2 SEARCH MEMBERS

- a. After logging into the portal, the member accounts holding Superannuation linked to your adviser Id will automatically load in the member list section.

The screenshot shows the Perpetual WealthFocus Adviser Online portal. The top navigation bar includes 'Members', 'Your details', 'Resources', 'Digital TPA', and 'Support staff'. The 'Members' tab is selected. Below the navigation bar, there is a search section with a dropdown menu for 'Search members associated with' and a search button. The search criteria are displayed below the dropdown, including Surname, Given name(s), Member Postcode, Date of Birth (From/To), Employer, Member Number, Member Type (Super and Pension), Status, and Switch Pending (No). The search results are displayed below the search criteria, showing a table of members. The table has columns for Action, Member Surname, Given name(s), Member Number, Account Number, Postcode, Member Type, Member Status, and FUA per account. Three members are listed, each with a 'View' button next to their name. The table is circled in green.

Action	Member Surname	Given name(s)	Member Number	Account Number	Postcode	Member Type	Member Status	FUA per account
View	[REDACTED]		AC [REDACTED]	[REDACTED]	2166	Superannuation	ACTIVE	75341.64
View	[REDACTED]		AC [REDACTED]	[REDACTED]	2763	Superannuation	ACTIVE	55066.08
View	[REDACTED]		AC [REDACTED]	[REDACTED]	2223	Superannuation	ACTIVE	26699.58

- b. You can search for a specific member number using criteria such as member number, product or members' names.

The screenshot shows the Perpetual WealthFocus Adviser Online portal. The top navigation bar includes 'Members', 'Your details', 'Resources', 'Digital TPA', and 'Support staff'. The 'Members' tab is selected. Below the navigation bar, there is a search section with a dropdown menu for 'Search members associated with' and a search button. The search criteria are displayed below the dropdown, including Surname, Given name(s), Member Postcode, Date of Birth (From/To), Employer, Member Number, Member Type (Super and Pension), Status, and Switch Pending (No). The search button is circled in orange. The search results are displayed below the search criteria, showing a table of members. The table has columns for Action, Member Surname, Given name(s), Member Number, Account Number, Postcode, Member Type, Member Status, and FUA per account. The table is partially visible, showing the first row.

Action	Member Surname	Given name(s)	Member Number	Account Number	Postcode	Member Type	Member Status	FUA per account
--------	----------------	---------------	---------------	----------------	----------	-------------	---------------	-----------------

- c. To search for pension members, click on the Switch Plan field and select Pension Plan in the drop-down menu. The member listing will refresh to display list of pension accounts linked to the adviser Id.

Showing Perpetual WealthFocus Super Plan members. Switch Plan:

Export to Excel

Drag a column header and drop it here to group by that column

Action	Member Surname	Given name(s)	Member Number	Account Number	PostC...	Member Type	Member Status	FICA per account
--------	----------------	---------------	---------------	----------------	----------	-------------	---------------	------------------

- d. Click “Export to Excel” option to export list of member records.

Showing Perpetual WealthFocus Super Plan members. Switch Plan: Perpetual WealthFocus Super Plan

Export to Excel

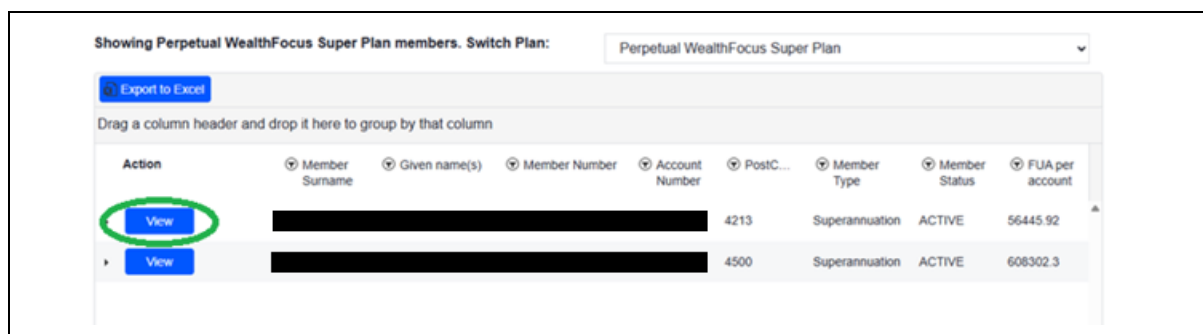
Drag a column header and drop it here to group by that column

Action	Surname	Given name(s)	Account Number	PostC...	Date Of Birth	Member Type	Member Status	Member Number
View			327026780	3101		Superannuation	ACTIVE	
View			327029325	4501		Superannuation	ACTIVE	
View			327031134	3910		Superannuation	ACTIVE	
View			327033126	2282		Superannuation	ACTIVE	

1 - 10 of 69 items

3 ACCESSING MEMBER RECORD

- a. Click “View” for access further details and request action for the selected member.



- b. Click on “Member Details” tab to view the member’s account details.



The Member details tab contains the below information. Member account information may be updated online subject to the adviser’s authority level for the selected member.

Tab	Description
Member details	Display member address details, member contact details, TFN consent status, member account details, member name and DOB.
Email	Display member’s nominated email address. Note change of email will trigger a notification to the member’s existing email address and will require member online authorization.
Beneficiaries	View member’s nominated binding or non-binding beneficiaries. Only non-binding beneficiaries may be updated online. Any changes to existing or new binding nominations must be requested by the member submitting the appropriate form. The form is available at www.perpetual.com.au
Correspondence	View a member’s historical annual statements and other correspondences
Adviser	View advisers contact details, authority level and advice fee details (if any) for a member

3.1 Member details

- a. Expand the member details section by clicking on the arrow on the collapsed row.

Member Number AC123456789 Type Superannuation Adviser name JOHN JACKSON

Member details Member information Document submission Fee arrangement

Member details >

Email >

Beneficiaries >

Correspondence >

Adviser >

- b. Click on the “Edit Member Details” button to edit member information, noting not all member details can be updated online and may require a member signed change of details form eg. Date of Birth, TFN status etc.

Member Number AC123456789 Type Superannuation Adviser name JOHN JACKSON

Member details Member information Document submission Fee arrangement

Member details ▼

Postal address

Addresses 123 Pitt Street

Suburbs SYDNEY

State NSW

Postcode 2000

Country

Contact details

Phone

Mobile

Tax File Number

TFN Status Valid Held

Membership details

Fund Perpetual WealthFocus Super Plan

Member Since 28/10/1999

Lost Member Found

Eligible Service Start Date 08/03/1993

Client details

Title Mr

Given Names Harry

Family Names Potter

Gender Male

Date of Birth 02/06/1971

Occupation details

Occupation White Collar Non Smoker

Edit Member Details

3.2 View/ Edit Member Email

Note an update to member's email will trigger a notification to the member's current email address to request authorisation of the email address change. Member is required to follow steps as outlined in the email to provide online approval for the change.

Email

Email: HarryPotter@outlook.com

Update

Email

Email:

Cancel Save

Email

Your email update request has been sent to the member's current email to verify. Please advise the member to accept.

Email: HarryPotter@outlook.com

Update

3.3 View/ Update Beneficiaries

- Click on "Edit Beneficiaries" to update, add new or remove existing non-binding beneficiary records.

Beneficiaries

Drag a column header and drop it here to group by that column

Beneficiary Name	Benefit (%)	Relationship	Date of Birth	Type	Expiry	Address Provided
Mr Jacob Dowler	50	Son	24/03/2005	Nominated	N/A	Yes
Mr Bob Smith	50	Brother		Nominated	N/A	No
Total	100					

Edit Beneficiaries

Beneficiaries

Mr Jacob Dowler - Son50.00

Mr Bob Smith - Brother50.00

Total100.00

Cancel

Add Beneficiary

Save Beneficiaries

- b. To delete or modify an existing non-binding beneficiary, click on the right arrow.

Beneficiaries

Mr Jacob Dowler - Son50.00

Mr Bob Smith - Brother50.00

Total100.00

Title:Mr

Given Name:Bob

Surname:Smith

Benefit (%):50

Relationship:Brother

Date of Birth:

Address:

Suburb:

State:Postcode:

Country:

Remove

Cancel

Add Beneficiary

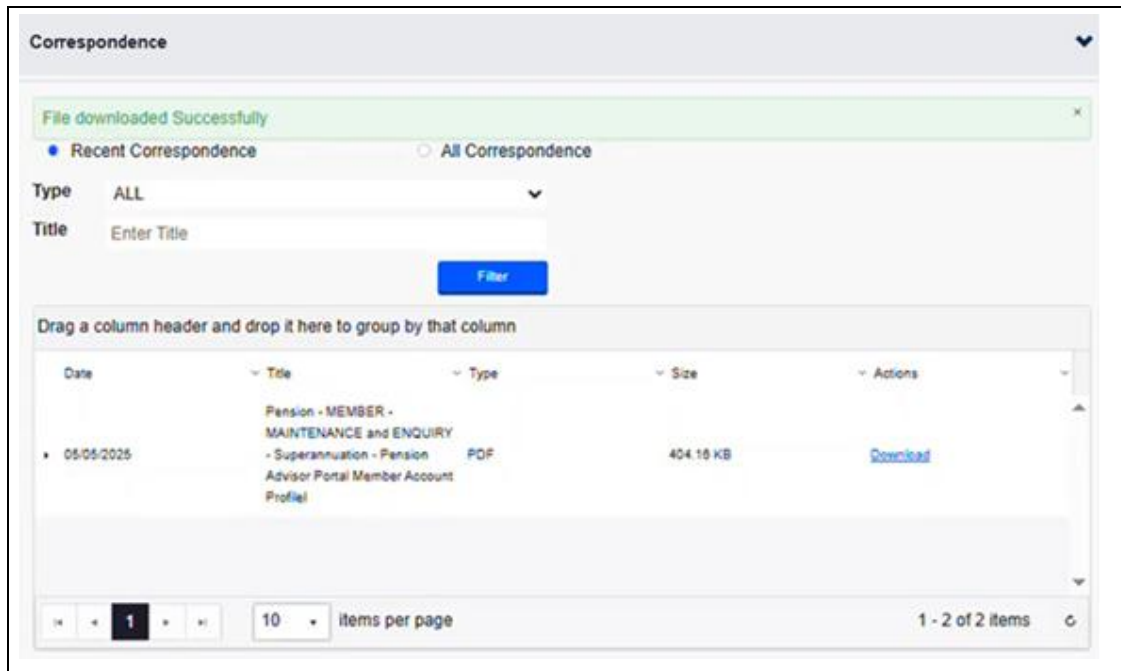
Save Beneficiaries

Any changes to existing or new binding nominations must be requested by the member using the appropriate form. The form is available at www.perpetual.com.au

3.4 Correspondence

The following documents are accessible and download copy is available for:

- Member annual statements
- Member account profile generated via the “Generate Documents” function
- Centrelink schedule generated via the “Generate Documents” function
- selected correspondence posted or emailed to member



3.5 Adviser

Information displayed in this section are:

Adviser Adviser contact details	Adviser, dealer group and adviser contact details.
Adviser Authority Level	Authority level as approved/authorized by the selected member eg. View only or Transact
Fee Details	Details of adviser service fee arrangements processed based on paper request form

Adviser

Adviser

Title

Mr

Surname

Johnson

Given names

Peter

Adviser No.

000227232

Dealer Group

COUNT FINANCIAL LIMITED

AFSL

227232

Adviser contact details

Work Phone

Mobile Phone

0400 123 123

Postal Address

123 Bourke Street

Suburb

FRANKSTON

State

Victoria

Postcode

3109

Country

AUSTRALIA

Adviser Authority Level

Full authority to transact on this account

Fee Details

Type

4 MEMBER INFORMATION

The Member information tab contains account, transactions and investment details.

Tab	Description
Benefit quote	Option to generate a benefit estimate showing the member balance if funds were to be transferred out (super) or withdrawn (pension) today.
Generate Documents	Options to generate a Centrelink Schedule (pensions only) or a member account profile document.
Insurance	View member insurance cover & insurance fee details (if applicable)
Investments	<p>Member's current account balances in investment options and investment strategy. Subject to adviser authority level for the selected member, there's ability to transact</p> <p>ie. switch between investment options or update member investment strategy.</p> <p>Note: Account unit balances are currently unavailable. Please contact us for member unit balances and refer to our website for unit prices.</p>
Consolidation requests	View pending or completed consolidation requests, if any, to move funds from another super fund(s)
Transaction History	View member account transaction history records
Member contributions	View members' current financial year contribution(s) and access historical contribution amounts up to last 3 years for the Perpetual plan. Please contact us if you require contributions' summary prior to 3 years ago.
Pension Details	Applicable to members holding pension account. Subject to adviser authority level for the selected member, there's ability to update pension details.

The screenshot shows the 'Member information' tab selected in the portal. At the top, member details are displayed: Member Number AC123456789, Type Superannuation, and Adviser name JOHN JACKSON. Below this, there are four tabs: Member details, Member information (selected), Document submission, and Fee arrangement. The main content area lists seven options, each with a right-pointing arrow: Benefit quote, Generate Documents, Insurance, Investments, Consolidation requests, Transaction History, and Member contributions.

4.1 Benefit quote

A benefit estimate may be generated based on the selected member's current holdings and latest available unit prices.

- a. Click on "Generate" after selecting appropriate responses to the two questions on member's employment status.

Benefit quote

Benefit Type

Full Withdrawal

Payee Type

Pay to Institution

Generate

If your member has been gainfully employed with the same employer since age 60 or has not ceased with any employer after the age of 60, select 'Yes', otherwise select 'No'.

☐ Yes ☒ No

Has your member permanently retired from the workforce, which includes working 10 hours or less per week, with no intention to increase?

☐ Yes ☒ No

- b. Benefit payment estimates and details are displayed for the selected member. Note amounts calculated are based on the latest available prices and subject to change

Quote Date	05/09/2025	Benefit Type	Full Withdrawal	Payee Type	Pay to Institution
Net Payment(\$)		82,701.66			
Gross Accumulation(\$)		79,914.35			
Interest:		2,787.31			
Gross Notional:		0.00			
Gross Insurance:		0.00			
Fees:		0.00			
Benefit Protection Rebate:		0.00			
Contribution Tax:		0.00			
No TFN Contribution Tax:		0.00			
Insurance Premiums:		0.00			
Lump Sum:		82,701.66			
Lump Sum Tax:		0.00			
Net Payment(\$)		82,701.66			
Preservation Components		Gross(\$)			
*PRESERVED		0.00			
*RESTRICTED		0.00			
*UNRESTRICTED		82,701.66			
Total:		82,701.66			
Tax Components		Gross(\$)	Lump Sum Tax(\$)	Net(\$)	
*TAXED		82,701.66	0.00	82,701.66	
*TAXFREE		0.00	0.00	0.00	
Total:		82,701.66	0.00	82,701.66	

4.2 Generate Documents

These are options to generate PDF documents containing current member account details and latest investments information.

Generate Documents

☒ Member Account Profile ☐ Centrelink Schedule

Generate

Member Account Profile	Provides current member account details, latest investment balances and holdings inclusive of: <ul style="list-style-type: none">• contact details eg. address, phone, email address etc.• tax/ tax free components• preservation status• transaction history• pension details (for members holding pension)
Centrelink Schedule	Schedule of information for purposes of income stream reporting to Services Australia. This option is available to members holding account-based pension accounts.

4.3 Insurance

Member insurance cover details are displayed here. Please note insurance details may not be reflected online if the member is currently not up to date with insurance fee payments or under claim. Salary Continuance will not display the type of contract ie. Indemnity or Agreed value. Please contact us for assistance.

Insurance		
Death Insurance	Cover: \$350000	Fee/Week \$17.9
TPD Insurance	Cover: \$350000	Fee/Week \$15.88
Salary continuance cover	Cover: \$0	Fee/Week \$0
Total cost per week		\$33.78

4.4 Investments

To request a switch between investment options or update existing investment strategy, please navigate to "Investments" under Member information tab.

- a. Click on the Investment change button to request switch and investment strategy change. Note this function is subject to the adviser's authority level for the selected member set to Transact.

Member Number AC123456789 Type Superannuation Adviser name JOHN JACKSON

Member details

Member information

Document submission

Fee arrangement

Benefit quote >

Generate Documents >

Insurance >

Investments ▼

Switch will be effective from 10/10/2025. Investment strategy will be effective from 10/10/2025.

If your request is received after 3:00pm, it will be processed using the next calculated entry and/or exit price. If it's a non-working day for us in Sydney, it will be processed using the next available entry and/or exit price. Please read the PDS for further details.

Please provide your new allocation and investment strategy in the below table. Both columns of the table are mandatory, and total should be equal to 100%

Investment Options	Current investments		Future investments	
	Current allocation	Investment strategy	Current allocation	Investment strategy
• Perpetual ESG Australian Share				
Perpetual ESG Australian Share	48.15 % \$592,810.62	50.00 %		
• Perpetual Smaller Companies				
Perpetual Smaller Companies	51.85 % \$638,252.29	50.00 %		
Total*	100.00 % \$1,231,062.91	100.00 %		

Investment change

b. Under Future investments, input the required percentages, accept the Terms & Conditions and click on Submit

Current allocation This is the desired percentage allocation for each investment option after the switch is processed.

Investment strategy This will be the new investment strategy percentage that will be used for additional contributions, savings plans, auto-rebalancing and compulsory auto-rebalancing (where applicable).

Example: Below is switch request to fully switch out of existing options and allocate 100% to the Barrow Hanley Global Share option. Investment strategy change requested is for 100% to the new investment option.

Investments

Switch will be effective from 10/10/2025. Investment strategy will be effective from 10/10/2025.

If your request is received after 3:00pm, it will be processed using the next calculated entry and/or exit price. If it's a non-working day for us in Sydney, it will be processed using the next available entry and/or exit price. Please read the PDS for further details.

Please provide your new allocation and investment strategy in the below table. Both columns of the table are mandatory, and total should be equal to 100%

Investment Options	Current investments		Future investments	
	Current allocation	Investment strategy	Current allocation	Investment strategy
<div>Ausbil Australian Active Equity</div> <div>Ausbil Australian Active Equity</div>	0.00 % \$0.00	0.00 %	Type Percentage	Type Percentage
<div>Barrow Hanley Global Share</div> <div>Barrow Hanley Global Share</div>	0.00 % \$0.00	0.00 %	100	100
<div>Perpetual ESG Australian Share</div> <div>Perpetual ESG Australian Share</div>	48.15 % \$592,810.62	50.00 %	Type Percentage	Type Percentage
<div>Perpetual Geared Australian</div> <div>Perpetual Geared Australian</div>	0.00 % \$0.00	0.00 %	Type Percentage	Type Percentage
<div>Perpetual Smaller Companies</div> <div>Perpetual Smaller Companies</div>	51.85 % \$638,252.29	50.00 %	Type Percentage	Type Percentage
<div>Vanguard International Shares Index (Hedged)</div> <div>Vanguard International Shares Index (Hedged)</div>	0.00 % \$0.00	0.00 %	Type Percentage	Type Percentage
Total*	100.00 % \$185,120.90	100.00 %	0.00 %	0.00 %

Terms & Conditions

The terms and conditions for the investment options you have selected may differ from your previous selection. Please contact your financial adviser or visit www.perpetual.com.au for a copy of the current Product Disclosure Statement with details of all available investment options.

For investors with **Perpetual Geared investment option**:

I have thoroughly read the 'Understanding investment risk' section of the Features Book, 'Gearing risk' section of the Features Book and the 'investment limits' section of the Features Book. I understand the greater risks associated with my selection of the Perpetual Geared Australian investment option and that it has a suggested timeframe of seven years or more. I acknowledge and accept that, if the value of my investment in the Perpetual Geared Australian investment option has risen above or fallen below my nominated percentage allocation (or the default percentage allocation if I do not make a nomination) at my nominated review date (or the default frequency if I do not make a nomination) it will automatically rebalanced to my nominated percentage allocation (or default percentage allocation) across my investments. I acknowledge that buy/sell spreads apply to rebalancing transactions.

☐ I confirm that the above information is correct and agree to the Terms and Conditions

Cancel

Submit request

c. Confirmation message should be displayed.

Investments

Investment Created Successfully - this may take some time to reflect online

Switch will be effective from 10/10/2025 . Investment strategy will be effective from 10/10/2025.

If your request is received after 3:00pm, it will be processed using the next calculated entry and/or exit price. If it's a non-working day for us in Sydney, it will be processed using the next available entry and/or exit price. Please read the PDS for further details.

Please provide your new allocation and investment strategy in the below table. Both columns of the table are mandatory, and total should be equal to 100%

Investment Options	Current investments		Future investments	
	Current allocation	Investment strategy	Current allocation	Investment strategy
Barrow Hanley Global Share	0.00 % \$0.00	0.00 %	100.00 %	100.00 %
Perpetual ESG Australian Share	48.15 % \$592,810.62	50.00 %	0.00 %	0.00 %
Perpetual Smaller Companies	51.85 % \$638,252.29	50.00 %	0.00 %	0.00 %
Total*	100.00 % \$1,231,062.91	100.00 %	100.00 %	100.00 %

Important notes:

- Switch requests submitted prior to daily cut-off time will initially reflect the latest available price until the confirmed price(s) for the effective date of your transaction(s) are available.
- Any switch requests received after daily cut-off time will have an effective date of the next Business Day.

4.5 Consolidation requests

The details of any historical or current requests initiated by the selected member in Perpetual Member Online to consolidate member's other super accounts into their Perpetual account are displayed here.

Consolidation requests

No in progress requests found

4.6 Transaction history

In Transaction History, there's ability to look up transactions for current financial year, a selected date range or by specific transaction types.

Transaction History

Export

Time Period: ☐ Current financial year ☒ Custom period

From 01/01/2025 To 13/08/2025

Transaction Type: All

Account: All

View

Received	Transaction Type	Total(\$)	Details
31/05/2025	Fixed Comb TPD Premium	-\$59.50	View
31/05/2025	Fix Death Comb Premium	-\$72.04	View
31/05/2025	Fixed Death (Ind) Premium	\$0.00	View
31/05/2025	Adv Ser Fee Ong	\$0.00	View
31/05/2025	Contributions Tax	\$19.74	View
30/04/2025	Contributions Tax	\$19.73	View
30/04/2025	Death (Staff) Premium	-\$131.54	View
31/03/2025	Contributions Tax	\$19.73	View
Total Transaction Amount:		\$4,769.00	

1 2

10 items per page

1 - 10 of 18 items

Export transaction records to xls or csv is available by clicking on the “Export” button.

Transaction History

Export

Time Period: ☒ Current financial year ☐ Custom period

Transaction Type: All

Account: All

View

XLS
CSV

Received	Transaction Type	Total(\$)	Details
26/09/2025	Adv Ser Fee—One Off	-\$50.00	View
26/09/2025	Contributions Tax	\$7.50	View
31/07/2025	Fix Death Comb Premium	-\$141.10	View

4.7 Member Contributions

Member contributions section displays members' concessional and non-concessional contributions for the financial year-to-date and a history of contributions for prior years. Note this relates only to contributions processed through this Fund.

Member contributions

Your contributions

Concessional Contributions

We estimate your Concessional Contributions received for the financial year to date are:

Concessional contributions limits for this financial year	
You and your employer have contributed	\$10,000.00
You and your employer can still contribute	\$20,000.00

Estimate of concessional contributions as at 15/08/2025	
Your concessional contribution cap for 2025/2026	\$30,000.00
Your concessional contributions	
Notional contributions (estimated for the full financial year)	\$0.00
Employer contributions	\$0.00
Voluntary salary sacrifice contributions	\$0.00
Other concessional contributions	\$0.00
Total concessional contributions	\$0.00

Concessional contributions (by financial year)	
Your concessional contributions for the year ending 30 June 2025	>
Your concessional contributions for the year ending 30 June 2024	>
Your concessional contributions for the year ending 30 June 2023	>
Your concessional contributions for the year ending 30 June 2022	>
Your concessional contributions for the year ending 30 June 2021	>

Non-Concessional contributions

We estimate that your non-concessional contributions received for the financial year to date are:

Estimate of Non-Concessional contributions as at 15/08/2025	
Non-Concessional contributions (year to date)	\$0.00
Your Non-Concessional contribution cap (current year)	\$120,000.00

Non-Concessional contributions (by financial year)	
Your non-concessional contributions for the year ending 30 June 2025	>
Your non-concessional contributions for the year ending 30 June 2024	>
Your non-concessional contributions for the year ending 30 June 2023	>
Your non-concessional contributions for the year ending 30 June 2022	>
Your non-concessional contributions for the year ending 30 June 2021	>

4.8 Pension Details

This section displays detailed information for members holding pension accounts.

Pension details

Pension TypeWealthFocus Account Based Pension

Date Commenced20/05/2003

Income Factors

Factors	Min	Max
Income Percentage	9.00 %	NA
Pension Payable	\$5,300.00	NA

Ad Hoc Payment Received This Year

Ad Hoc Payment Details	Date	Gross	Net
No ad hoc payment information provided			

Transfer Balance Cap Information

Description:Commencement Value

Effective Date:30 June 2017

Amount:\$61,012.22

This is the value of your pension account balance at 30 June 2017. This value is based on the investment returns, including all fees and charges levied at the time of calculation.
Note: From 1 July 2017 we are required to report your closing account balance at 30 June 2017 to the ATO for purposes of calculating the status of your Transfer Balance Cap.

Pension Term

Nominated Pension Pay Term	0 Year
Pension Term Remaining	0 Year

Benefit Details

Pension Details	Annual	Instalment
Gross Elected	\$5,300.00	\$1,325.00
Tax Free Ratio	40.59 %	40.59 %
Tax Free Component	\$2,151.27	\$537.82
Taxable Component	\$3,148.73	\$787.18
PAYG Tax	\$0.00	\$0.00
Tax Offset	\$0.00	\$0.00
Net PAYG Tax	\$0.00	\$0.00
Net Pension	\$5,300.00	\$1,325.00
Post Age50 Taxable Component	\$0.00	\$0.00
Additional Tax	\$0.00	\$0.00

Payment Calendar

Payment Frequency	Payment Payable Date	Gross Instalment Pension	Net Instalment Pension	Status	Paid Date
Quarterly	22/08/2025	1,325.00	1,325.00	Awaiting Payment	

Payment Information

Last Pension Payment Date:

Last Pension Payment Amount:\$0.00

Drawdown Method:PERCENTAGE

Total Payments Year to Date:\$0.00

Payment Method	Frequency	Bank Name	BSB	Account	Percentage
EFT	Quarterly	Commonwealth Bank of Australia	062-513	368405	100.00

Edit Details

Subject to adviser authority for the selected member, there's ability to click on Edit Details. Please enter or select new values and click "Preview" to verify updated values are valid eg. nominated amounts are within allowed range.

Pension details

Edit Pension Details

Pension Election

Pension	Amount	Additional Information
Nomination Type	Minimum Payment Limit	Yearly min: \$5,300.00 - Yearly max: \$81,455.19
Nomination Value(\$)	5300	
Payment Frequency	QUARTERLY	
Payment Month	Aug/Nov/Feb/May	

Cancel

Preview

On successful validation, click on Save & Submit.

Drawdown Method:

PERCENTAGE

Total Payments Year to Date:

\$520.83

Payment Method	Frequency	Bank Name	BSB	Account	Percentage
EFT	Quarterly	Cuscal Limited	802-388	551327	100.00

Back

Save & Submit

5 DOCUMENT SUBMISSION

This is an online document submission functionality providing the ability to upload documents or requests for the selected member. Documents submitted are routed through to Registry administration services for action or processing where applicable. To be valid, all transactional requests must be signed and dated at time of submission.

Please select the appropriate option from the “Type” drop down list. Then click on Browse to select the document you wish to submit. On successful upload, the document will appear in the window.

The screenshot shows the 'Document submission' tab selected in the top navigation bar. Below the navigation bar, there's a 'Submit Documents' section with a dropdown arrow. The main area contains an instruction: 'Upload your documents in order to submit them for processing'. Below this, there's a 'Type' dropdown menu with 'Select Type' as the current selection. A 'Select File' section shows 'No file chosen' with a 'Browse' button. Below the file selection, there's an 'Upload' button. A table below the upload section allows for grouping by column, with a prompt: 'Drag a column header and drop it here to group by that column'. The table has columns: Date, File name, Type, Size, and Actions. A single row is visible with the following data: Date: 19/05/2025, File name: Investment switch - test.docx, Type: Investment change - Super, Size: 188.94 KB, and Actions: Download, Remove. Below the table, there's a pagination control showing '10 items per page' and '1 - 1 of 1 items'. A 'Submit for processing' button is located at the bottom right of the form.

Date	File name	Type	Size	Actions
19/05/2025	Investment switch - test.docx	Investment change - Super	188.94 KB	Download Remove

6 YOUR DETAILS

Adviser personal and contact details are displayed here. Note only selected information is available to be edited online. For security reasons, please contact us to request any changes to your registered Email address.

Your details

Licensee name ABC FINANCIAL PLANNING	Licensee number 18457	Licensee AFSL 123456	ADVISER ID 283656
---	-----------------------	----------------------	-------------------

CONTACT DETAILS

SURNAME	SMITH		
GIVEN NAME(S)	JOHN		
WORK PHONE	0400 123 456	MOBILE PHONE	0400 123 456
EMAIL (contact us to update)	john.smith@ABCFinancial.com		
EMAIL STATUS	VALID		

POSTAL ADDRESS

ADDRESS LINE 1	123 Pitt Street		
ADDRESS LINE 2			
SUBURB	SYDNEY	STATE	NSW
		POSTCODE	2060

Initiate data connection with XPlan

Initiate data connection with iLINK

Edit Details

6.1 IRESS Xplan data feed

To subscribe to daily data feeds from IRESS Xplan, click on the "Initiate data connection with XPlan" button. A pop-up message will display with important references that you will need to input in the IRESS Xplan portal to complete your registration.

Please take note of the system generated code and instructions as shown in sample screenshot below. Please contact IRESS if you experience any issues with the registration or if the daily files are not received following the online registration.

Your XPlan connection code

Please note the below code and follow the instructions provided by IRESS. You may also be required to input the dealer group AFS licence and your adviser license numbers in format 000123456/000123456 on the IRESS/Xplan portal.

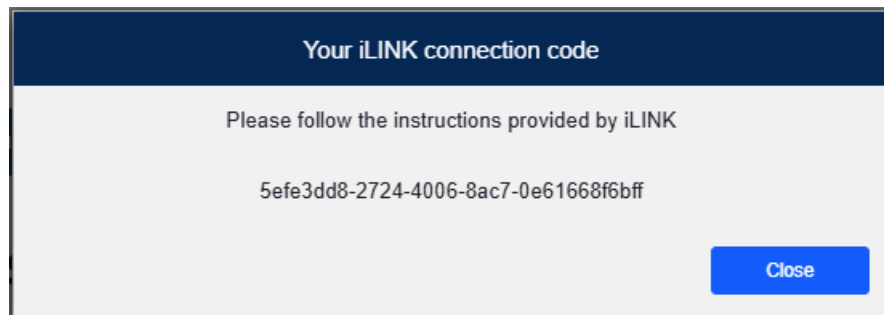
09acc567-dd5c-49cb-816e-7c5ddab368f6

Close

6.2 InvestmentLINK data feed

To subscribe to daily data feeds from InvestmentLINK, click on the “Initiate data connection with iLINK” button. A pop-up message will display with important references that you will need to input in the InvestmentLINK portal to complete your registration.

Please contact InvestmentLINK/ Midwinter if you experience any issues with the registration or if the daily files are not received following the online registration.



7 ADVISER SUPPORT STAFF

Advisers have ability to set up and manage their support staffs' user access to Perpetual Adviser portal. A Support staff can access and service members who are linked to the adviser eg. submit a switch request, generate Centrelink schedule etc. The support staffs' level of access (transact or view-only) is determined by the adviser.

Important notes:

- Advisers are responsible for their support staff actions and use of Adviser portal.
- Any actions performed by the support staff is/are taken to be action by the adviser and all actions performed using the adviser support staff login are taken to be an action by the adviser.

7.1 Set up a Support staff

- Access the "Support staff" tab, enter support staff Surname, Given name, Email address and click "Invite".

The screenshot shows the 'Support Staff' section of the Perpetual WealthFocus Adviser Online portal. At the top, there's a navigation bar with 'Members', 'Your details', 'Resources', 'Digital TPA', and 'Support staff' (which is highlighted). Below the navigation bar, the 'Support Staff' title is followed by instructions: 'To allow your support staff to access your client's information, initiate access below. Note: All fields are required.' A green message box states: 'An email has been sent to Harry.Potter@ABCFinancial.com. Once verified, they can create an account and log in.' Below this, there are three input fields for 'Surname', 'Given name(s)', and 'Email address', each followed by an 'Invite' button. At the bottom, a 'Support staff details' table is shown with columns: Surname, Given name(s), User ID, Last login date, Status, Role, and Action. The table contains one entry for 'Potter', 'Harry', 'Harry.Potter@ABCF...', 'No login yet', and 'SupportStaffRea...'. The table has a pagination bar at the bottom showing '1 - 1 of 1 items'.

Perpetual

Contact Us Logout

WealthFocus Adviser Online

Members Your details Resources Digital TPA Support staff

Support Staff

To allow your support staff to access your client's information, initiate access below.
Note: All fields are required.

An email has been sent to Harry.Potter@ABCFinancial.com. Once verified, they can create an account and log in.

Surname

Given name(s)

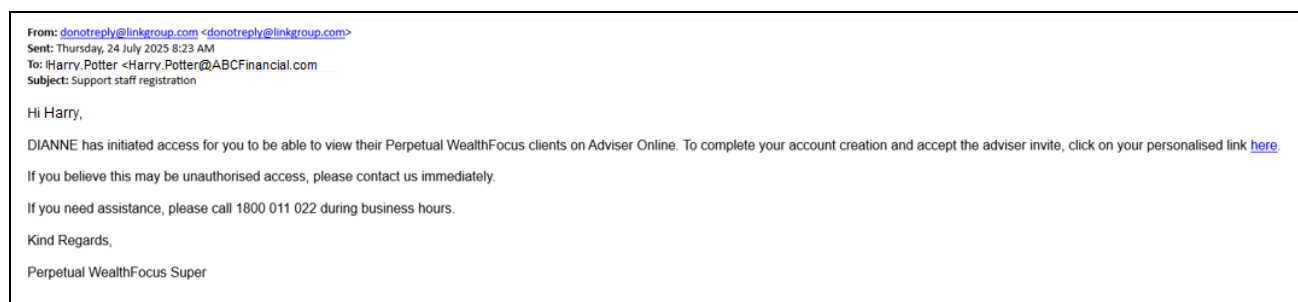
Email address

Invite


Surname	Given name(s)	User ID	Last login date	Status	Role	Action
Potter	Harry	Harry.Potter@ABCF...	No login yet		SupportStaffRea...	

1 - 1 of 1 items

- b. Support staff to click on the link in the invitation email received.



- c. Support staff is redirected to the Adviser portal microsite to begin account registration. Contact details entered are validated against the adviser invitation details.

Perpetual 

WealthFocus Adviser Online

Support Staff online registration

Create an account

An adviser has invited you to access Perpetual WealthFocus member information online.
Note: All fields are required.

Your contact details

Surname	Given name(s)	Work phone
<input type="text" value="Potter"/>	<input type="text" value="Harry"/>	<input type="text" value="02 2222 2222"/>
Mobile phone	Email	
<input type="text" value="0412345678"/>	<input type="text" value="Harry.Potter@ABCFinancial.com"/>	

Your user ID will be issued post registration

[Next](#)

- d. On successful validation, support staff is requested to nominate personal password for the online account.

Support Staff online registration

Create an account

Password

Password **Strong** ⓘ

Confirm password

- Must be a minimum of 10 characters
- It must include atleast one lowercase letter, one uppercase letter and one number
- It cannot contain your first or last name
- Password must be entered twice and must match to validate

☒ I have read and accepted the [Terms & Conditions](#) for access to Adviser Online.

Back **Complete**

Need Help? If you need assistance, please call 1800 011 022 during business hours.

- e. Please note the Support staff ID displayed on page, click “Set up MFA now” to continue next step.

Perpetual **WealthFocus Adviser Online**

Support Staff online registration

Welcome aboard! Your account has been successfully created.

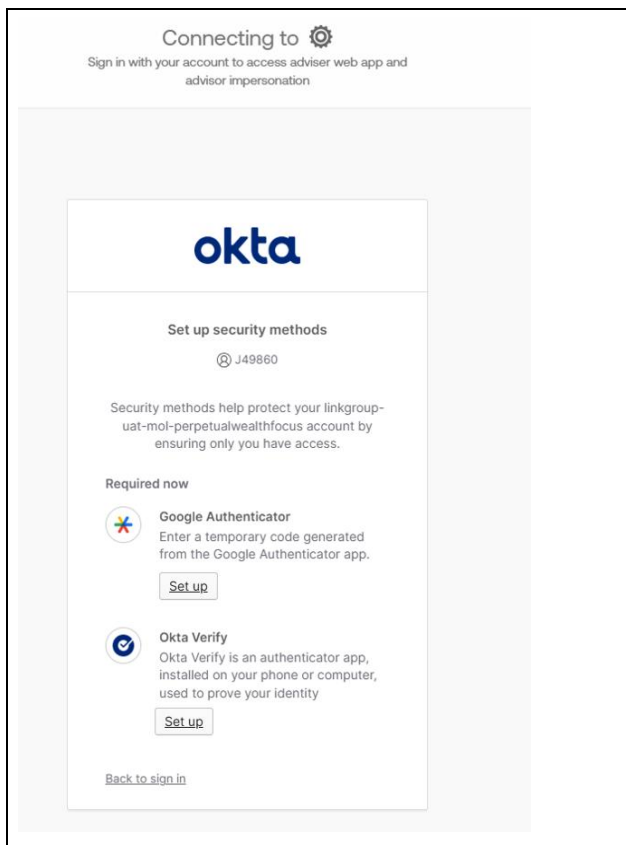
Your Support Staff ID is **B59515**. You will need this ID to log in to Adviser Online.

To enhance the security of your account, please login and take a moment to set up Multi-Factor Authentication (MFA).

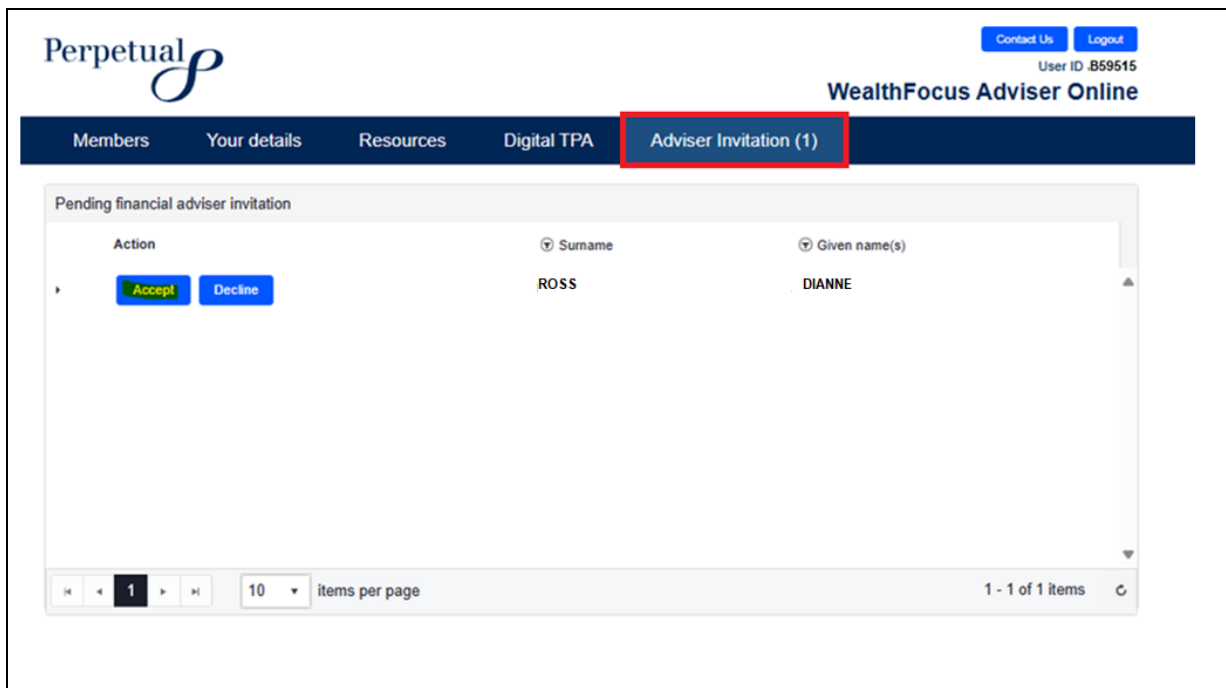
Set up MFA now

Need Help? If you need assistance, please call 1800 011 022 during business hours.


- f. Select the preferred security method for multi-factor authentication (MFA)



- g. After successfully setting up MFA, support staff is logged into Adviser portal.
Access "Adviser Invitation" tab to accept adviser invitation.



- h. Following acceptance, the support staff user is now able to perform lookup and access member accounts that are currently linked to the selected adviser.



[Contact Us](#)
[Logout](#)

User ID B59515

WealthFocus Adviser Online

Members
Your details
Resources
Digital TPA
Adviser Invitation (1)

?

Add Member

Search members associated with: DIANNE ROSS

Surname
Member Number

Given name(s)
Member Type
Super and Pension

Member Postcode
Status

Date of Birth
From To
Switch Pending
No

Employer

Search

Showing Perpetual WealthFocus Super Plan members. Switch Plan:

Perpetual WealthFocus Super Plan

Export to Excel

Drag a column header and drop it here to group by that column

Action	Member Surname	Given name(s)	Member Number	Account Number	PostC...	Date Of Birth	Member Type	Member Status
View	Davies	Jane	AC700013856	327023312	4213	18/02/1942	Superannuation	ACTIVE
View	Jones	Jane Ellen	AC700016944	327023536	4500	22/07/1947	Superannuation	ACTIVE

7.2 Re-invite Support staff

For scenario where the invitation email sent to support staff have expired or inadvertently deleted by the support staff, the adviser has ability to resend the invitation email by clicking on the “Re-invite” button.

The screenshot shows the 'Support Staff' page with a navigation bar at the top containing 'Members', 'Your details', 'Resources', 'Digital TPA', and 'Support staff'. Below the navigation bar, there are two columns of text: 'To allow your support staff to access your client's information, initiate access below. Note: All fields are required.' and 'To check if the support staff already has access through another adviser in your business, search for their existing profile below.' Below this, there are three input fields: 'Surname', 'Given name(s)', and 'Email address', each with a corresponding 'Search' button. Below the search fields, there is an 'Invite' button. Below the 'Invite' button, there is a table titled 'Support staff details' with columns: 'Action', 'Surname', 'Given name(s)', 'Status', 'Last login date', 'Invitation', and 'Role'. The table contains two rows of data. The first row has a 'Cease' button and an 'Edit role' button. The second row has a 'Re-Invite' button (highlighted with a green box) and a 'Cease' button. The table data is as follows:

Action	Surname	Given name(s)	Status	Last login date	Invitation	Role
Cease Edit role	Support	Aaron	Active	24/09/2025	Accepted	Read-only
Re-Invite Cease	Jones	Angela	Active	27/08/2025	Pending	Read-only

7.3 Edit Support Staff Role

The access level for a support staff can be changed from default Read-only to Transact access. The Transact level access will allow the support staff to request switches or investment strategy updates on member accounts (subject to member authority for the linked adviser).

On the Support staff page,

- click on the “Edit role” button for the selected support staff
- select the new role type and click Confirm

Note the updated role will be applicable to all financial advisers that may be linked to the same support staff member.

The screenshot shows the 'Support Staff' page with a navigation bar at the top containing 'Members', 'Your details', 'Resources', 'Digital TPA', and 'Support staff'. Below the navigation bar, there are two columns of text: 'To allow your support staff to access your client's information, initiate access below. Note: All fields are required.' and 'To check if the support staff already has access through another adviser in your business, search for their existing profile below.' Below this, there are three input fields: 'Surname', 'Given name(s)', and 'Email address', each with a corresponding 'Search' button. Below the search fields, there is an 'Invite' button. Below the 'Invite' button, there is a table titled 'Support staff details' with columns: 'Action', 'Surname', 'Given name(s)', 'Status', 'Last login date', 'Invitation', and 'Role'. The table contains two rows of data. The first row has a 'Cease' button and an 'Edit role' button (highlighted with a green box). The second row has a 'Re-Invite' button and a 'Cease' button. The table data is as follows:

Action	Surname	Given name(s)	Status	Last login date	Invitation	Role
Cease Edit role	Jackson	John	Active	25/09/2025	Accepted	Read-only
Re-Invite Cease	Jones	Angela	Active	27/08/2025	Pending	Read-only

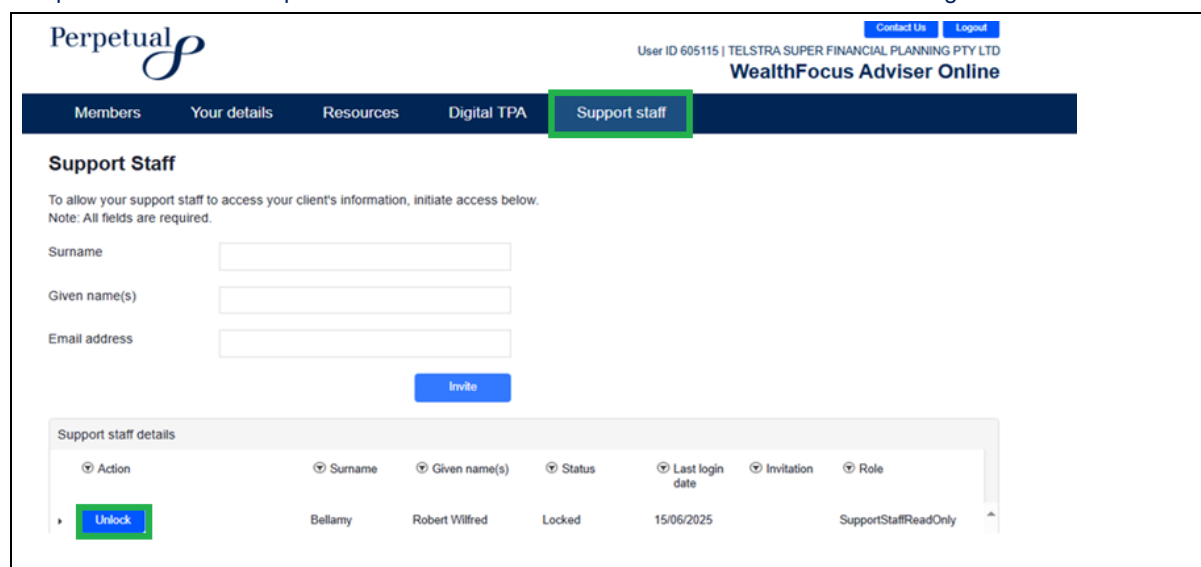
A modal dialog titled 'Edit role type' is open over the table. It contains two radio buttons: 'Read-only' (selected) and 'Transact'. Below the radio buttons, there is a note: 'Note: Changing this role will affect all financial advisers with the same support staff.' At the bottom of the modal, there are 'Cancel' and 'Confirm' buttons.

7.4 Support staff user security administration

Advisers can manage and monitor their support staffs' portal access, login status and details at any time via the Support Staff tab.

a. Unlock support staff ID

Support staff access is automatically locked after 45 days of inactivity. Advisers can unlock a support staff login via the Support staff page as shown below. Unlocking a support staff login will trigger an email confirmation to the support staff advising account is unlocked. The support staff is required to login to Adviser portal within 5 days to complete the reactivation process otherwise the user account will need to be unlocked again.

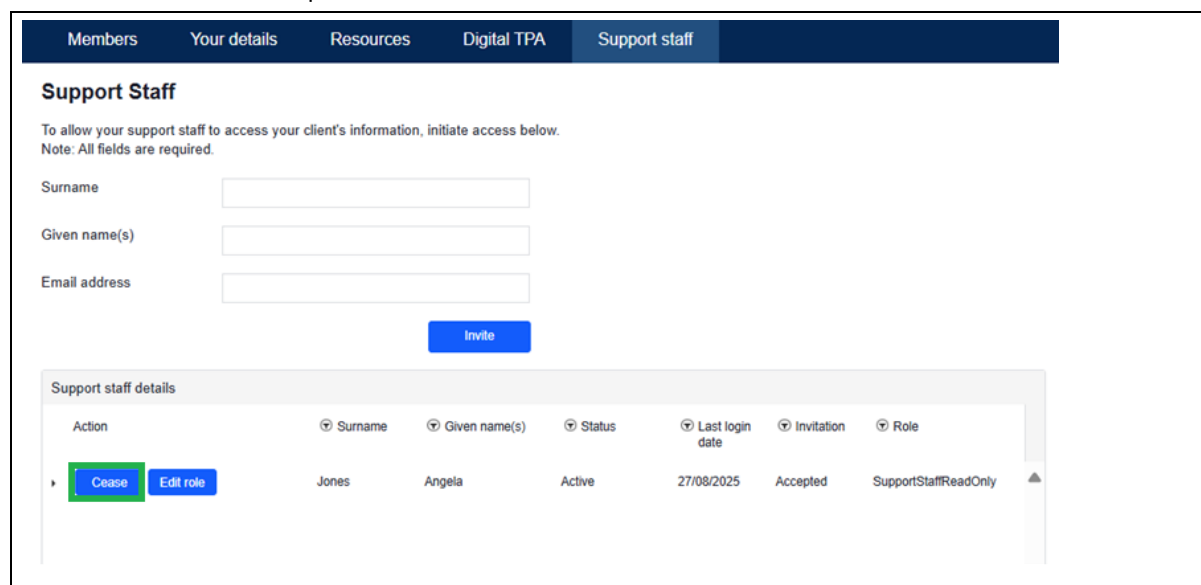


The screenshot shows the 'Support Staff' section of the Perpetual Adviser Online portal. The 'Support staff' tab in the top navigation bar is highlighted with a green box. Below the navigation bar, the 'Support Staff' heading is followed by instructions: 'To allow your support staff to access your client's information, initiate access below. Note: All fields are required.' There are three input fields for 'Surname', 'Given name(s)', and 'Email address', followed by an 'Invite' button. Below this is a 'Support staff details' table with columns: Action, Surname, Given name(s), Status, Last login date, Invitation, and Role. The first row shows a support staff member named Bellamy, Robert Willfred, with a status of 'Locked' and a last login date of 15/06/2025. The 'Action' column for this row has a green box highlighting the 'Unlock' button.

Action	Surname	Given name(s)	Status	Last login date	Invitation	Role
Unlock	Bellamy	Robert Willfred	Locked	15/06/2025		SupportStaffReadOnly

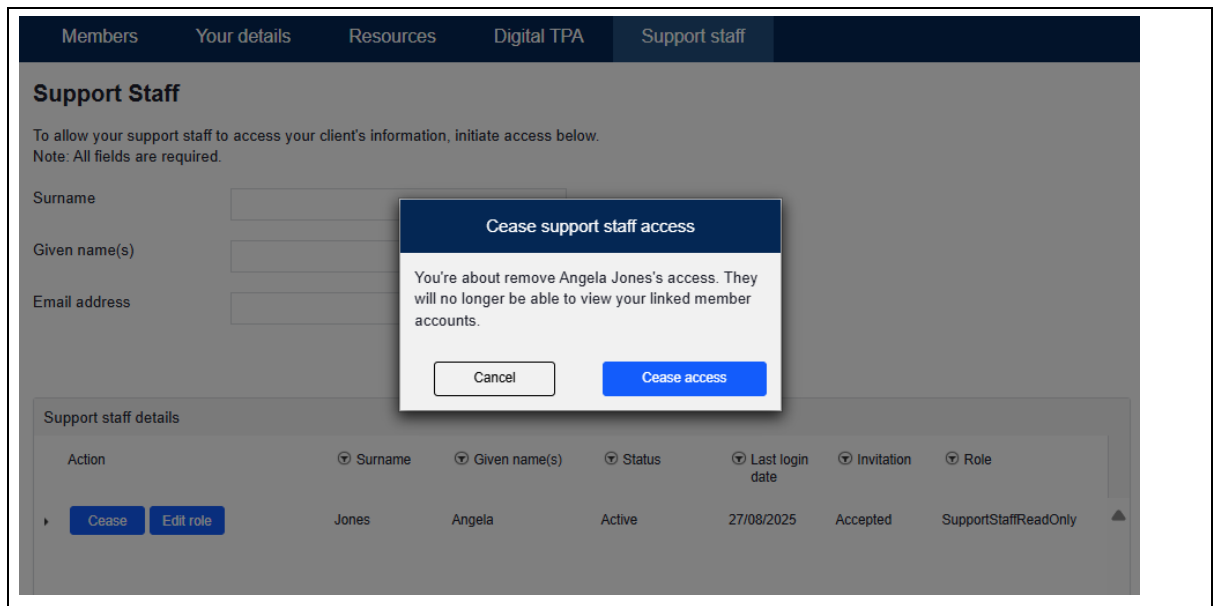
b. Terminate support staff access

On the Support staff page, click on the "Cease" button for the relevant support staff access. Please note that when access is ceased, the support staff will no longer be able to access members that are linked to the selected adviser. However, the support staff access linked to other advisers will not be impacted where the same support staff is associated with multiple advisers.



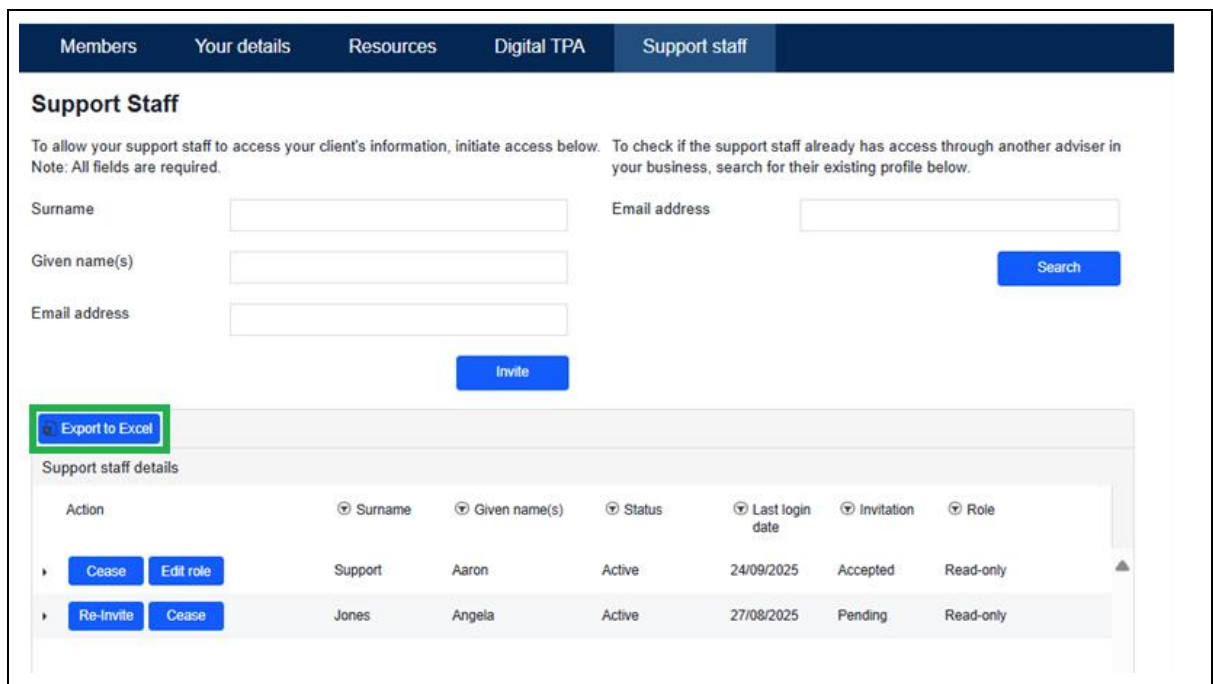
The screenshot shows the 'Support Staff' section of the Perpetual Adviser Online portal. The 'Support staff' tab in the top navigation bar is highlighted. Below the navigation bar, the 'Support Staff' heading is followed by instructions: 'To allow your support staff to access your client's information, initiate access below. Note: All fields are required.' There are three input fields for 'Surname', 'Given name(s)', and 'Email address', followed by an 'Invite' button. Below this is a 'Support staff details' table with columns: Action, Surname, Given name(s), Status, Last login date, Invitation, and Role. The first row shows a support staff member named Jones, Angela, with a status of 'Active' and a last login date of 27/08/2025. The 'Action' column for this row has a green box highlighting the 'Cease' button, and a blue 'Edit role' button is also visible.

Action	Surname	Given name(s)	Status	Last login date	Invitation	Role
Cease Edit role	Jones	Angela	Active	27/08/2025	Accepted	SupportStaffReadOnly



c. Export Support staff user records

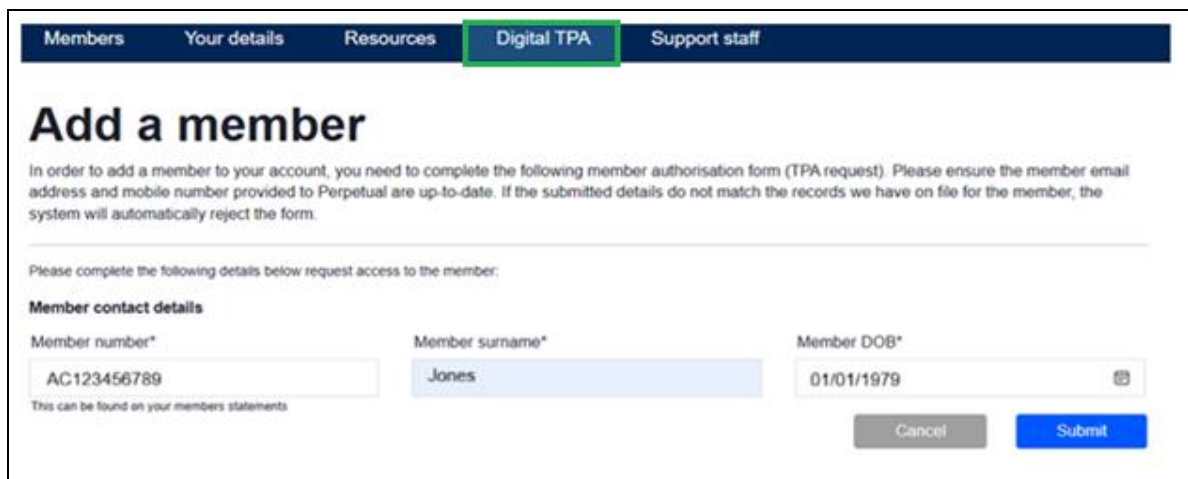
To assist advisers in the provisioning and monitoring of support staff's access and login status, an option is available to export user records to excel. Note it is the responsibility of an adviser to manage their support staff access to the portal inclusive of revoking the online account access where appropriate.



8 DIGITAL THIRD-PARTY AUTHORITY (TPA)

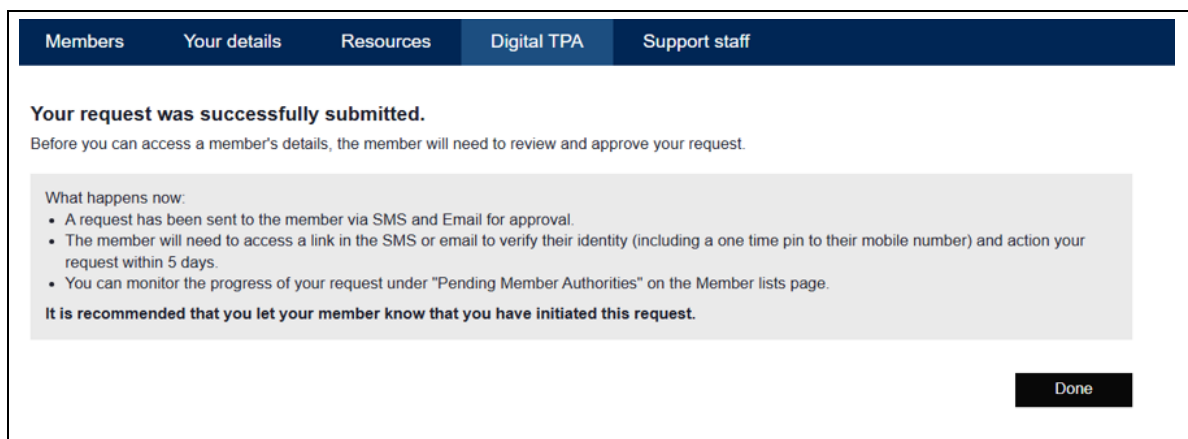
This function allows an adviser to initiate an online request to link or add a member account subject to member approval via an online authorisation process.

- a. Navigate to the “Digital TPA” page and enter the member’s account details. The information is validated and matched to current details registered for the member account.



The screenshot shows the 'Digital TPA' tab selected in the top navigation bar. The main heading is 'Add a member'. Below it, a paragraph explains that a member authorization form (TPA request) must be completed, ensuring the member's email address and mobile number are up-to-date. A note states that if the submitted details do not match the records, the system will automatically reject the form. A section titled 'Please complete the following details below request access to the member:' contains a sub-section 'Member contact details'. This section has three input fields: 'Member number*' with the value 'AC123456789' (a note below says 'This can be found on your members statements'), 'Member surname*' with the value 'Jones', and 'Member DOB*' with the value '01/01/1979'. At the bottom right of this section are 'Cancel' and 'Submit' buttons.

- b. On successful validation, an email is sent to the member’s registered email for approval.



The screenshot shows the 'Digital TPA' tab selected in the top navigation bar. The main heading is 'Your request was successfully submitted.' Below it, a paragraph states: 'Before you can access a member's details, the member will need to review and approve your request.' A grey box contains the following text: 'What happens now:' followed by a bulleted list: 'A request has been sent to the member via SMS and Email for approval.', 'The member will need to access a link in the SMS or email to verify their identity (including a one time pin to their mobile number) and action your request within 5 days.', and 'You can monitor the progress of your request under "Pending Member Authorities" on the Member lists page.' Below the list, it says 'It is recommended that you let your member know that you have initiated this request.' At the bottom right of the page is a 'Done' button.

- c. The adviser can monitor status of any TPA requests initiated via the “Pending Member Authorities” section in Members tab.

Members
Your details
Resources
Digital TPA
Support staff

Search members [?]

Add Member

Search members associated with:

Surname

Member Number

Given name(s)

Member Type
Super and Pension

Member Postcode

Status

Date of Birth
From To

Switch Pending
No

Employer

Search

Showing Perpetual WealthFocus Super Plan members. Switch Plan:

Perpetual WealthFocus Super Plan

Export to Excel

Drag a column header and drop it here to group by that column

Action	Member Surname	Given name(s)	Member Number	Account Number	PostC...	Member Type	Member Status	FUA per account
View	Brown	Peter	AC22222222	987654321	2150	Superannuation	ACTIVE	276606.91
View	Jones	Susan	1212121212	123456789	2150	Superannuation	ACTIVE	276606.91
View	Smith	Bob	AC987654321	4545454545	2150	Superannuation	ACTIVE	276606.91

1
10 items per page
1 - 1 of 1 items

Pending Member Authorities

Below are the applications that have been submitted for new member TPA agreements that are pending responses from the member (Past 60 days only)

Member Number	Member Surname	Member DOB	Date Submitted	Status
AC123456789	Jones	01/01/1979	25/09/2025	PENDING

- d. An automated email sent to the member will contain a personalised link that member can click on or copy and paste the link in browser window. The member will be directed to the Adviser Online Microsite.

On the Microsite, member to enter their Member number, Surname and Date of Birth and on successful validation a security PIN will be triggered to the member's registered mobile number. Member to enter pin to proceed to next step

Perpetual

Contact Us

Adviser Online

Welcome to the Adviser Online Portal

Financial adviser request

A financial adviser has requested to access your super/pension account.

Please enter your details below to review the pending request 1234.

Member number*

Surname*

DOB*

Member number is mandatory
*This is your account number from which the adviser authority is being requested. This can be found on your annual statement or other member statements.

Security Pin

We've just sent a 6 digit pin to mobile ending XXXXXXXX334

Enter Pin

Didn't receive an SMS? [Reset Code](#)

Continue

- e. Member to review adviser information and nominate an authority level for their adviser.

Authority levels are:

View only	Adviser and their support staff will be able access your account and investment information online or verbally.
Transact	Adviser and their support staff will be able to act on your behalf for transactions online or verbally

Member to click on "Accept" after checking the terms and conditions.

Perpetual

Contact Us

Susan Jones
Adviser Online

Welcome to the Adviser Online Portal

Financial adviser request

A financial adviser has requested to access your super/pension account.

Adviser Details

Please review the following details of the adviser who has requested access to your super/pension account

ASIC ID	00000004
License ID	00028705
License Name	TELSTRA SUPER FINANCIAL PLANNING PTY LTD
Full Name	JOHN ADVISER
Email Address	john.adviser@ABCFinancial.com.au
Mobile Phone	760392566
Work Phone	760392566
Address	123 Pth Street, SYDNEY NSW 2000
Authority termination date	9/9/2035

Authority level

☐ View only - Your adviser and their elected support staff will be able to access your information online or verbally.

☒ Transact - Your adviser and their elected support staff will be able to act on your behalf for transactions online or verbally. They are not able to change key details like bank accounts or tax file numbers.

Please read and accept the following terms if you want to allow this adviser to access your super/pension account.

☒ I have reviewed the details above & give permission for JOHN ADVISER to access my super/pension account.

☒ I understand that by accepting this request, all other financial advisor authorities on my account will be removed.

☒ I understand that agreeing to this adviser request will not replace any non-adviser relationships

Reject Accept

Adviser will be notified via email when the member accepts or rejects the request. Upon acceptance, the member's account is automatically linked to the adviser and accessible on Adviser portal.

9 DIGITAL ADVISER SERVICE FEE

This function allows an adviser to initiate a digital fee request. Subject to the member approval online, Perpetual will accept this as a valid instruction and a fee arrangement may be established for an ongoing adviser service fee fixed for a 12-month period and/or a one-off advice fee processed from the member's account.

a. For a selected member, click on the "Fee arrangement" and then click on "Create fee request"

Member Number AC987654321Type SuperannuationAdviser name JOHN ADVISER

Member details

Member information

Document submission

Fee arrangement

Current fees

Create fee request

Request Adviser service fee for Susan Jones

Fees must not be more than 3% of the members balance and the member must maintain a minimum balance of \$1,000. For new fixed term fee arrangements, the fee will begin on the day the member has accepted/authorised the fee request online. Fixed term fees are paid monthly by the withdrawal of units from the account. A percentage fixed term fee is calculated on the month end balance of the investment. Note that fixed term member advice fee arrangements are required to be renewed every 12 months.

Fee Type - Instalment Type
Please complete the following fields below:

Select the fee type to be deducted from the member account

☐ One-off advice fee (including GST)

☒ Fixed term fee (including GST)
The maximum fixed term adviser service fee is 3% per annum of the member's account balance.

What percentage of the super balance will you charge per annum?
Enter up to value of 3.00

What is the estimated dollar amount total over 12 months?
An estimate of the adviser service fee payable over the fixed term based on current account balance

How did you calculate this estimate?
Please provide explanation of the method used to work out the estimate

500 characters remaining

Information required for the fund
Please complete the following fields below:

What is the total fee payable for the advice, including the fee deduction amount requested?
An estimate of the adviser service fee payable over the fixed term based on current account balance

This is the total amount being charged to the member

Inclusions
Please select all relevant fields in the areas below, this information is used by the trustee of the fund to complete their auditing requirements.

Services provided for the above fee

☐ ongoing service

☐ management and administration of member account

☐ not applicable - strategic advice only

☒ account establishment and commencement

☐ periodic review of member account

Strategies provided for the above fee

☐ strategic superannuation advice

☒ superannuation investment portfolio advice

☒ superannuation contribution strategy

☐ insurance in superannuation strategy

☐ superannuation withdrawal advice and management

Financial adviser acknowledgement
Please read all terms and conditions carefully prior to acknowledging

- I confirm that the services to be provided to the account holder for the fixed term fee arrangement fall within the range of the services listed above and I will promptly notify Perpetual in writing if I am no longer entitled to receive this fee.
- I acknowledge that where agreed services are not provided to the client, Perpetual reserves the right to claw back fees.
- Perpetual has absolute discretion to accept or reject the set up of any fixed term fee arrangement.

☒ I acknowledge and agree to the above.

Cancel

Submit

b. When the online form is submitted successfully, an email request will be sent to the member's registered email for review and approval of the fee request.

Current fees

Create fee request

Your fee form was successfully submitted.
A Request has been submitted to your member. They will need to review and accept the terms and conditions of the fee before proceeding.

Please remember to let your member know that you have requested this fee.

Just so you know:

1. A email request has been sent to the member for approval.
2. If we do not receive a response from the member within 5 days this request will expire and you can re-submit.

We've sent you a confirmation email to you.

Done

c. The email request sent to the member will contain a personalised link that member can click on or copy and paste the link to new browser window. The member will be redirected to the Adviser Online Microsite.



Dear Cris Andrew,

JOHN JACKSON licensed by TELSTRA SUPER FINANCIAL PLANNING PTY LTD has requested a fee arrangement for your superannuation account.

To authorise or decline this fee arrangement please click here <https://pptwealth-aol-fee-uat.np.linkgroup.com/76d206956-1efc-4ea6-b3e7-0ec2364ecab0>, this link will be active for 5 days.

Yours sincerely,

WealthFocus Super

We recommend you read the relevant Product Disclosure Statement (PDS) as it contains important information about how the fund works, including fee structure, unit pricing, super contributions and insurance (if applicable).

This email has been prepared by Perpetual Trustee Company Limited ABN 18 000 888 535, AFSL 234426 as promoter of Perpetual WealthFocus Superannuation Fund (ABN 42 772 007 500). It is general information only and is not intended to provide you with financial advice or take into account your objectives, financial situation or needs. You should consider, with a financial adviser, whether the information is suitable for your circumstances. To the extent permitted by law, no liability is accepted for any loss or damage as a result of any reliance on this information. The PDS for Perpetual WealthFocus Superannuation Fund (ABN 42 772 007 500) issued by Equity Trustees Superannuation Limited (ETSL) ABN 50 055 841 757, AFSL 229757, RSE L0001458, should be considered before deciding whether to acquire or hold units in the fund. The PDS and Target Market Determination for the relevant fund can be obtained by calling 1800 011 022 or visit www.perpetual.com.au. The performance of any fund or the return of an investor's capital is not guaranteed.

On the Microsite, member to enter Member number, Surname and Date of Birth. On successful validation, a security PIN will be triggered to the member's registered mobile number. Enter PIN to proceed to next step

Welcome to Perpetual Wealth Adviser Request Site

Fee Arrangement Form

A financial adviser has submitted this fee arrangement form for their services to your super/pension account.

Please enter your details below to review the pending request.

Member account number*

AC987654321

Surname*

Jones

Date of Birth*

01/01/1970

*This is your account number from which the advice fee is being requested.

Security Pin

We've just sent a 6 digit pin to mobile ending XXXXXX226

Enter Pin

Didn't receive an SMS? [Resend Code](#)

Continue

d. Member to review adviser information, requested fee details, terms and conditions and click Accept. An automated email is triggered to notify adviser of member acceptance or rejection.

Welcome to Perpetual Wealth Adviser Request Site

Fee Arrangement Form

A financial adviser has submitted this fee arrangement form for their services to your superpension account.

Adviser Details

Please review the following details of the adviser who has requested a fee deduction from your superpension account.

ASIC ID

001002467

Licensee ID

000227705

Licensee Name

ABC Financial Planning

Full Name

JOHN ADVISER

Email Address

Adviser@ABCFinancial.com.au

Mobile Phone

7603921566

Work Phone

7603921566

Address

123 Pitt Street SYDNEY NSW 2000

Super Fund Details

Fund Name

Perpetual WealthFocus

Fund Phone Number

1800 011 022

Fund Email

superandpension@perpetual.com.au

Your Member Number

AC987654321

Fee Type

Please review the following details relating to the Fee type to be deducted from your superpension account.

Type of Fee

Ongoing fee (%)

Percentage or Dollar amount?

percentage

Percentage of the super balance charged per annum

2

Total dollar amount deducted from Super

2000

How the estimation was calculated

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Unprocessed fees can be ceased by contacting Perpetual Wealthfocus before the fees have been deducted

Information required for the fund

Please review the following details related to the fee request.

Total advice fee (including amount being deducted)

2000

1

Inclusion

Please review the following inclusion as part of the fee agreement.

Services included in your fee:

account establishment and commencement

Strategies included in your fee:

superannuation investment portfolio advice,superannuation contribution strategy

Inclusion

Please review the following inclusion as part of the fee agreement.

Services included in your fee:

account establishment and commencement

Strategies included in your fee:

superannuation investment portfolio advice,superannuation contribution strategy

Member declaration and acknowledgement

I/we declare that all details in this form are true and correct. (We consent to my/our adviser or my/our adviser's licensee, receiving the amount specified and to the deduction of this amount, via a redemption of units from my/our account. If signing under a power of attorney, I have not received notice of revocation of that power (please send a certified copy of the power of attorney if it has not been previously provided to Perpetual).

I/we confirm that the amount specified above is consistent with a fee arrangement that I/we have entered into with my/our adviser and solely relates to my/our interest in the Fund. The amount specified above is a reasonable amount for the advice services that have or will be provided to me/us. If I/we wish to withdraw my/our consent, I/we may do so at any time before the fee is deducted from the account by contacting Perpetual.

I/we acknowledge and agree that by consenting to the above advice fee, my/our account balance and potential returns will reduce. Perpetual may in its absolute discretion decline to pay the advice fee and I/we understand that it may be an offence, including an early release of superannuation scheme, if the details and confirmation in this form are not true and correct.

For Field Term fees I acknowledge that I have read the current Product Disclosure Statement (PDS) and agree to be bound by the provisions of the Trust Deed (as amended from time to time) and the terms and conditions in the PDS. I acknowledge and agree that the ongoing fee arrangement may continue where Perpetual is advised by the outgoing AFS licensee or financial adviser that the services under the ongoing fee arrangement are to be provided by a new AFS licensee or financial adviser and that I have consented to that transfer.

☒ Please accept terms and conditions.

Reject

Accept

Privacy Policy

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Perpetual Adviser Online Portal Super & Pension User Guide November 2025

Classification: Public

Perpetual

10 TERM ALLOCATED PENSION MEMBERS

Please be advised that members of non-accumulation investment structure such as TAPs will only have basic member details displayed on Adviser Online. Benefit quotes and document generation are not available for these members. Please contact us for assistance.



Contact Us

Logout

User ID 283172 | ABC Financial Pty Ltd

WealthFocus Adviser Online

Members

Your details

Resources

Digital TPA

Support staff

Harry Potter

Important notes:

Please note that member current account balances are based on latest available unit prices and are subject to change.

Insurance

The insurance fee rates charged for members with occupational loading factors may differ slightly from the rate determined by multiplying the white-collar rates with the occupational loading factors due to rounding. The weekly value is provided as a guide only and may also differ when charged monthly. Insurance fees are deducted monthly in arrears.

Member contributions

Amounts shown are for the current financial year and only include the contributions processed through this Fund. Processing can take several days and those transactions that are still processing will not be included in this calculation.

Transaction history

Please note, new transactions received will initially reflect the latest available price until the confirmed price(s) for the effective date of your transaction(s) are available. For further information in relation to how units are priced, please refer to the latest PDS available on our website. Note that switch transactions are not available to view online. Please refer to the Investment page for your current investment options allocation.

Note: Not all member details can be displayed for this member due to their investment structure. Please call the fund for full details.

Member Number

AC720254610

Type

Pension

Adviser name

JOHN JACKSON

Member details

Document submission

Member details

>

Email

>

Beneficiaries

>

Correspondence

>

Adviser

>

Privacy Policy | Terms & Conditions |

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11 SUPPORT & TROUBLESHOOTING

- a. If you or your member did not receive the expected email(s) in your inbox in relation to Third-party authority or Adviser service fee, please check the Spam or Junk folders.
- b. If a member clicking on the personal link within the TPA or adviser fee request email does not successfully redirect to the Adviser online microsite, please try copy and paste the link to new browser window.
- c. If you're unable to create a fee request or experiencing error initiating a fee request, it may be due to:
 - adviser authority for the member is currently View-only access. Please contact your member to approve Transact level authority.
 - Dealer RCTI may not be in place. Please contact us for assistance.
- d. Advisers and their support staff can initiate digital TPA, the member will have an option to elect for view-only or transact level authorities. Please note that currently the communications only mention view only access however, if Transact has been elected/ approved by the member, the Edit buttons will be enabled online.
- e. Members have 5 days to respond to an online fee request. Advisers can re-submit request upon expiry.
- f. Members have 5 days to respond to an online TPA request. Advisers can re-submit request upon expiry.
- g. For XPlan subscription, if you encounter an issue entering the reference code generated on Adviser portal into IRESS XPlan, with the IRESS XPlan system more generally, or with the data being presented in XPlan, please contact or lodge a ticket with IRESS connect
<https://IRESS-connect.atlassian.net/servicedesk/customer/portals>
- h. For support and assistance, please call:
Wealth Focus - 1800 011 022
Select - 1800 677 442
Email: advisersupport@apac.mpms.mufg.com

Please ensure you provide the below information to facilitate technical review and investigations.

1. **What is your portal login ID and name?**

2. **Which Adviser portal did you access?**

Product	Super Pension
WealthFocus	<input type="checkbox"/> https://adviser.aas.com.au/login/Pw
Select	<input type="checkbox"/> https://adviser.aas.com.au/login/Pk

3. **What browser did you use?**

<input type="checkbox"/>	Microsoft Edge
<input type="checkbox"/>	Google Chrome
<input type="checkbox"/>	Safari
<input type="checkbox"/>	Other
<hr/>	

4. **Is the issue or error reproduced after you have cleared browser cache?**

Please visit [How to clear the cache and cookies in your web browser | Australian Taxation Office](#) for step-by-step guide on how to clear browser cache.

5. Describe the issue or error you're experiencing. Please include details of:

- Date and time (approx.) when error/issue experienced
- steps or actions performed on the portal leading up to the issue/error.

6. Provide relevant screenshot of error message displayed on page (if any).