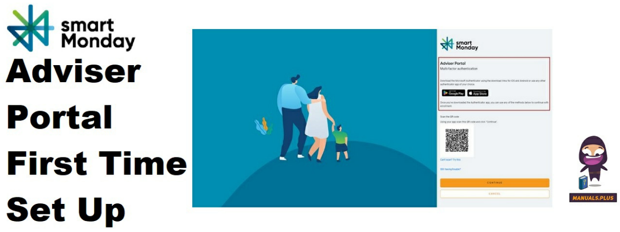

smartMonday Adviser Portal First Time Set Up User Guide

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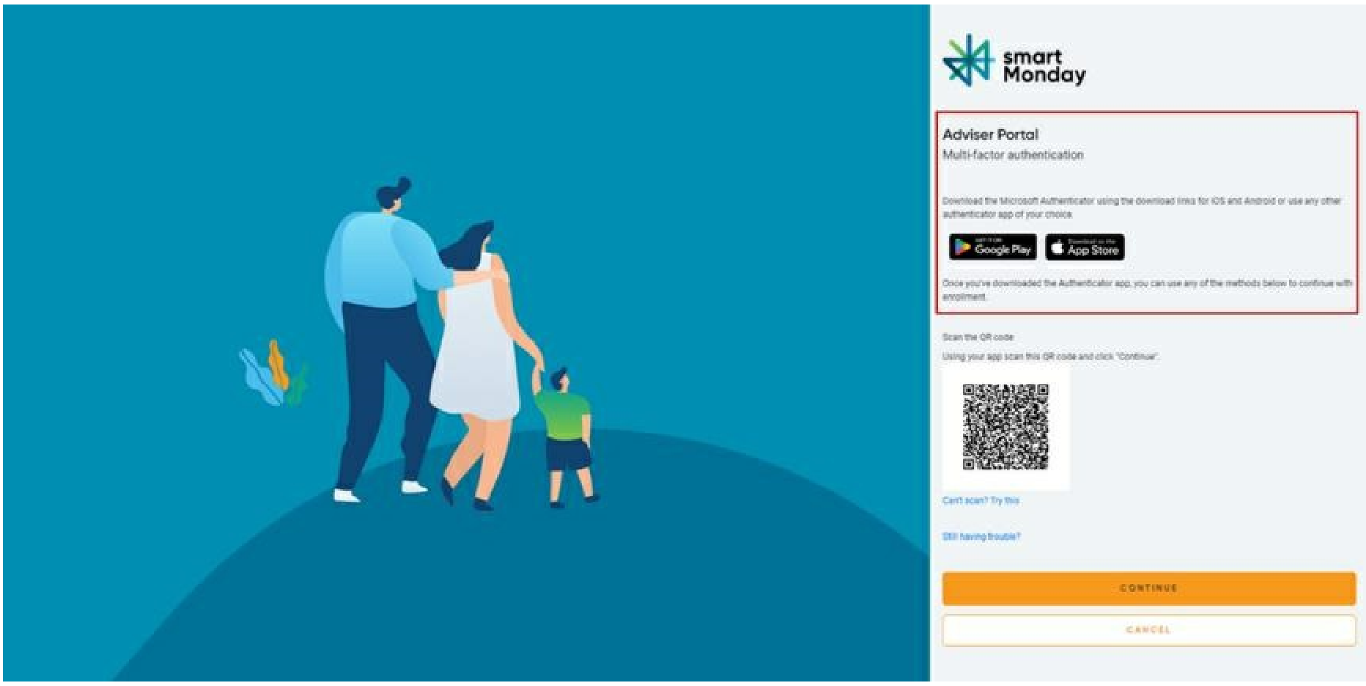
smartMonday Adviser Portal First Time Set Up



Product Information

Specifications:

- **Product Name:** smart Monday Adviser Portal
- **Functionality:** Allows registered smart Monday Advisers to view and act on behalf of clients with active authority.
- **Data Update Frequency:** Daily

Product Usage Instructions

Overview

The overview page (portal dashboard) provides aggregated data about your smart Monday clients including:

1. Active Members
2. Members Expiring
3. New Members
4. Total Balance
5. Members Overview graph
6. Client List for individual client details

Client List

The Client List screen displays all smartMonday clients. Click through to access individual client accounts.

Individual Client Accounts

The overview screen shows client details, active Authority, account balances, and BPAY details. View transactions and export them to a CSV file. Rollovers and Contribution Limits are also available.

Transactions

View and export a list of transactions on the client's account.

Rollovers
Details of rollovers into the client's account, including in-progress and completed rollovers, are displayed.

Contribution Limits
Track contributions against Contribution Limits for the current financial year with details on tax deductions.

Account Summary
Download a one-page account summary as a PDF for the current or previous financial year.

Insurance
View details of your client's current insurance coverage through their smart Monday account, including the type of cover, amount, premium, and waiting periods.

Frequently Asked Questions (FAQ)

- **How often is the data updated in the Adviser Portal?**
  The data within the Adviser Portal is updated daily.
- **Can I view clients without an active authority in the smartMonday Adviser Portal?**
  No, clients without an active authority recorded against their smartMonday account will not be visible in the portal.

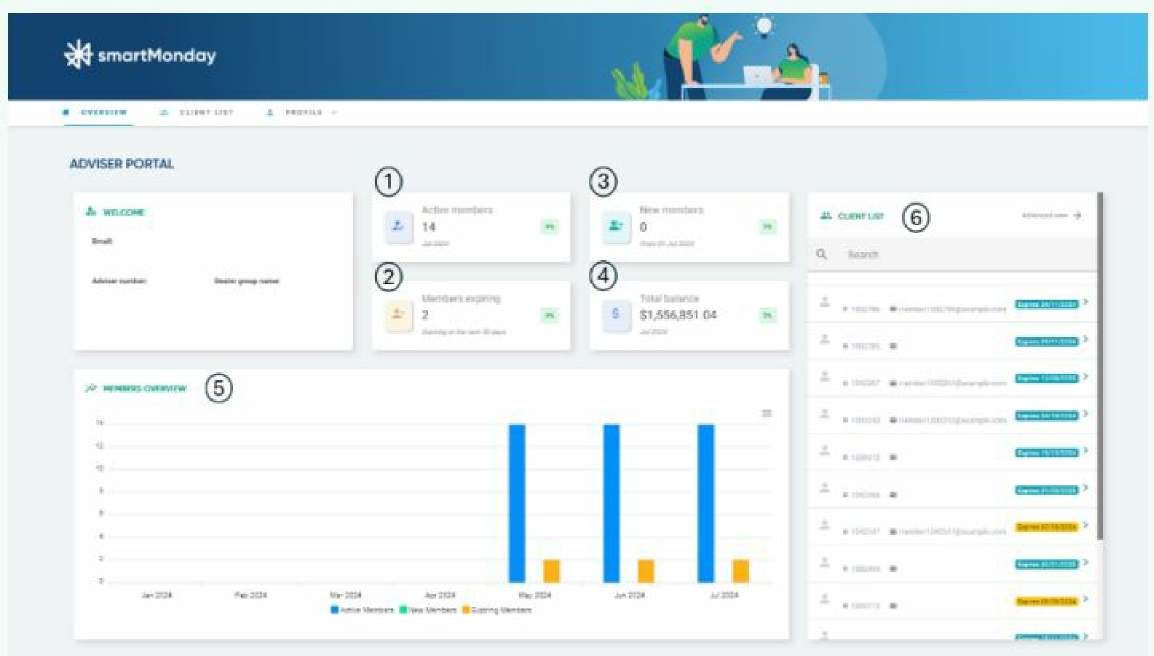
INTRODUCTION

- This guide provides an overview of the items registered smartMonday Advisers can view within the smartMonday Adviser Portal.
- The portal allows you to view and act on behalf of clients, where you have active authority to do so.
- Clients without an active authority recorded against their smartMonday account will not be visible to you in the smartMonday Adviser Portal.
- Data within the Adviser Portal is updated daily.

Overview

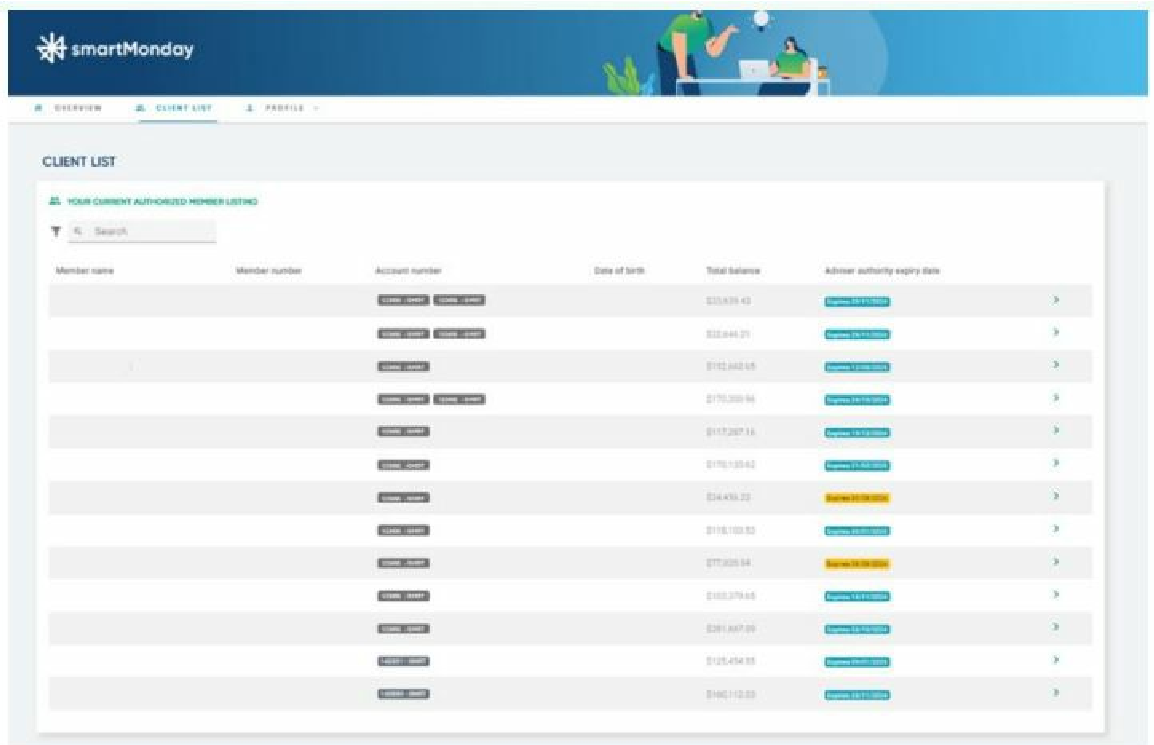
The overview page (your portal dashboard) contains aggregated data about your smartMonday clients. The different values provided are:

1. **Active Members –** the number of smartMonday clients you have active authority for.
2. **Members Expiring –** the number of smartMonday clients you have with an active authority that expires within the next 90 days.
3. **New Members –** the number of new Authorities that have been put in place in the current month.
4. **Total Balance –** the total balance of all smart Monday accounts that you have active authority for.
5. **Members Overview –** A graph to track the number of members you have serviced in the fund over the past 6 months.
6. **Client List** – A full listing of current clients, with the ability to search for individual clients and click through to their accounts.



Client list

The Client List screen allows you to see all your smartMonday clients on one page. You can click through from this page to individual client's accounts.

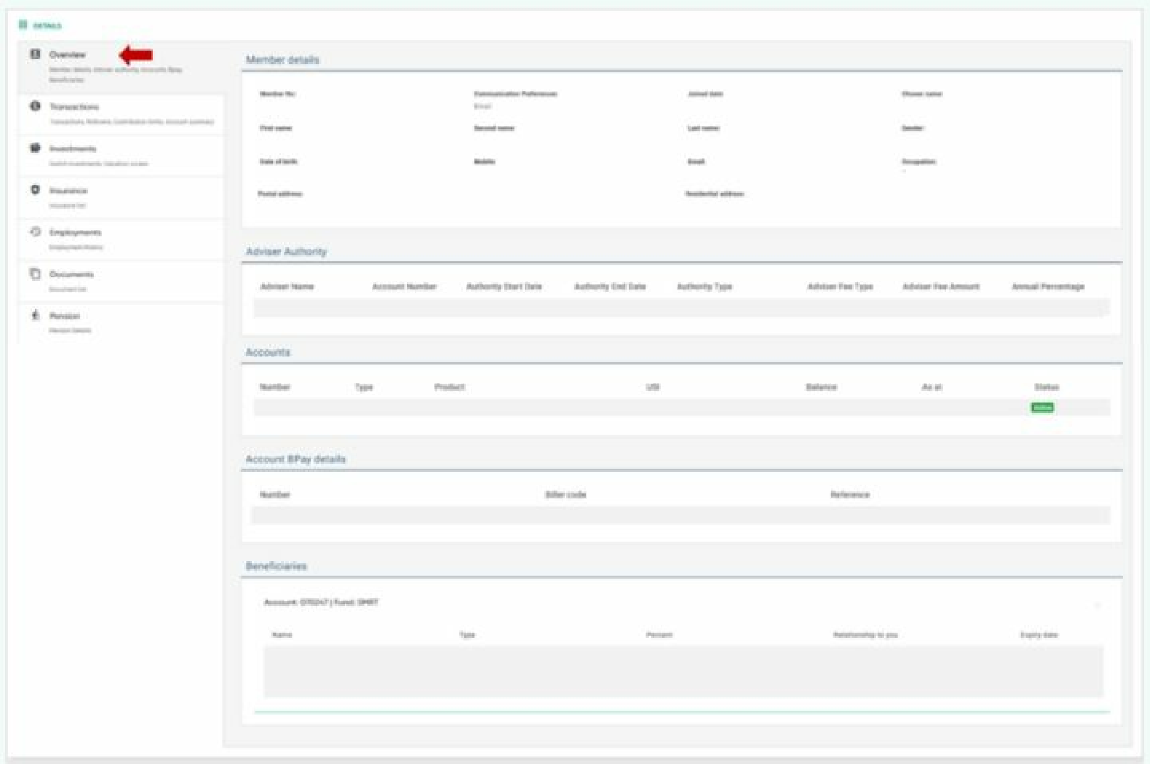


Individual Client Accounts

Overview

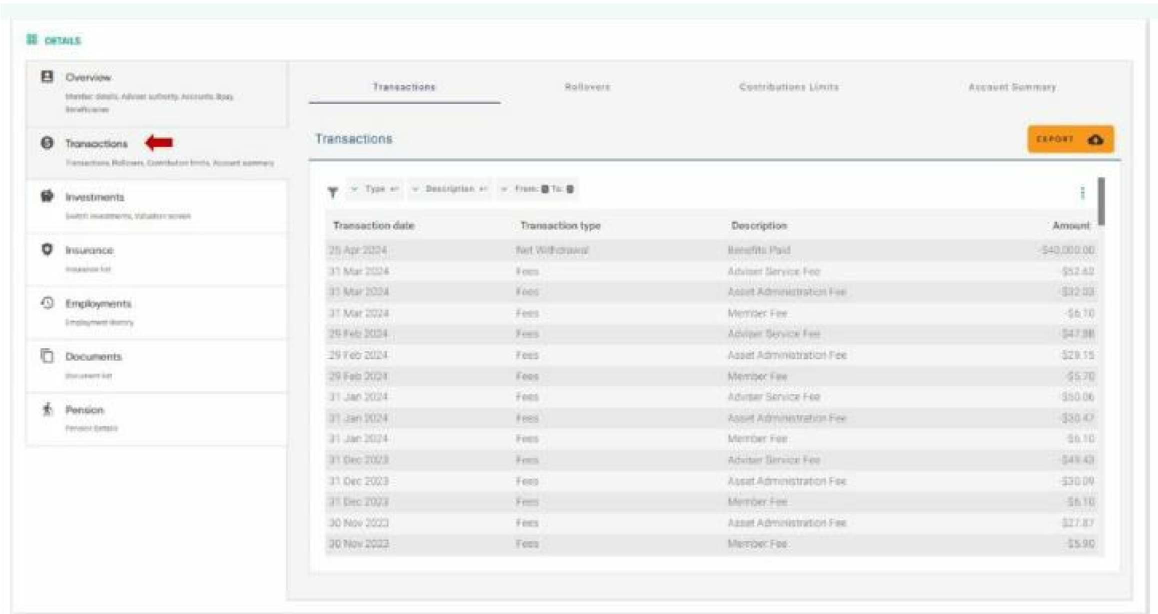
The overview screen displays your client's details, details of the current active Authority, plus your clients' smartMonday account balances and BPAY details.

Note: if a smartMonday member has multiple accounts and you only have an active Authority on one of their accounts, you will only see the details of this account. If the member has multiple accounts and you have authority over multiple accounts, details of all accounts will be displayed.



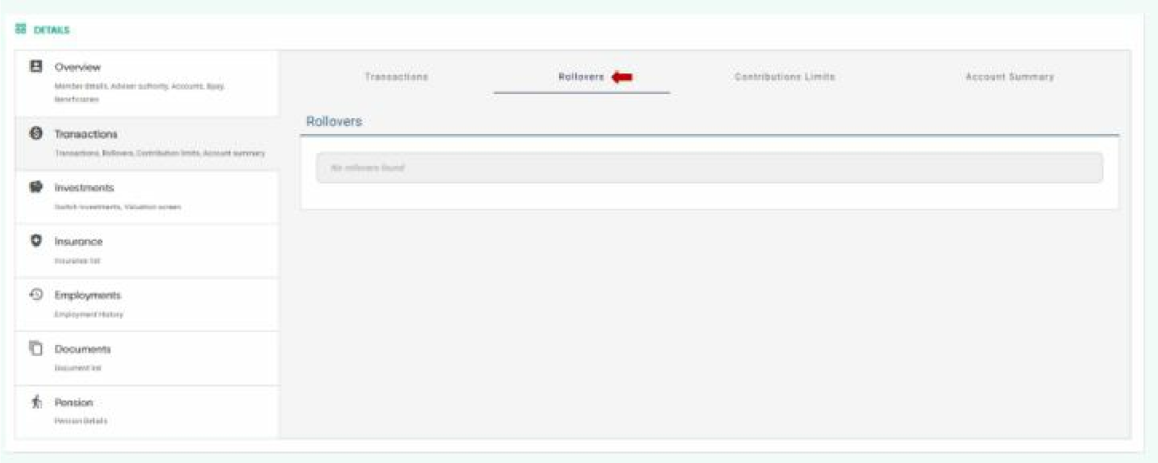
Transactions

- The transactions list displays a list of transactions that have occurred on your client's smartMonday account.
- The list of transactions can be exported into a CSV file.

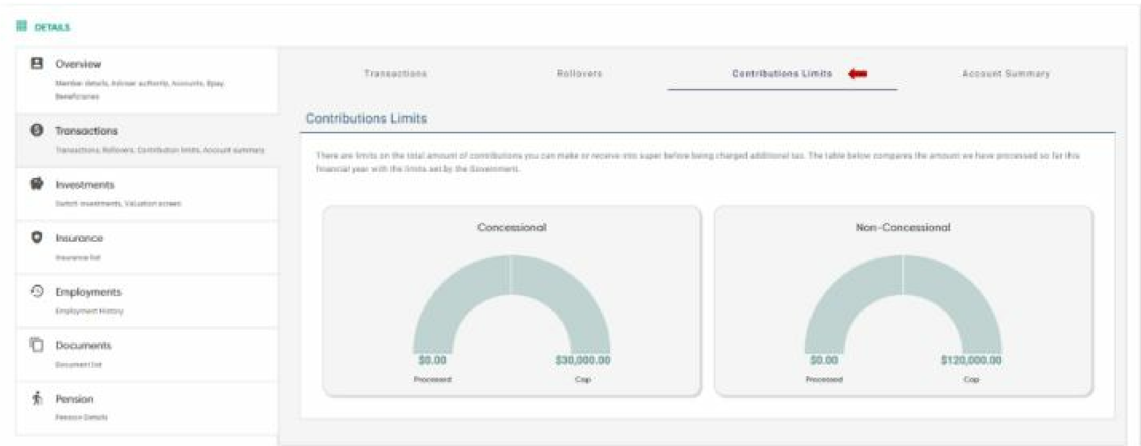


Rollovers

The rollovers screen displays details of all rollovers into your client's account. Any rollover that has been requested and is in progress will be visible here. Completed rollovers, including the value, can also be viewed in this section.

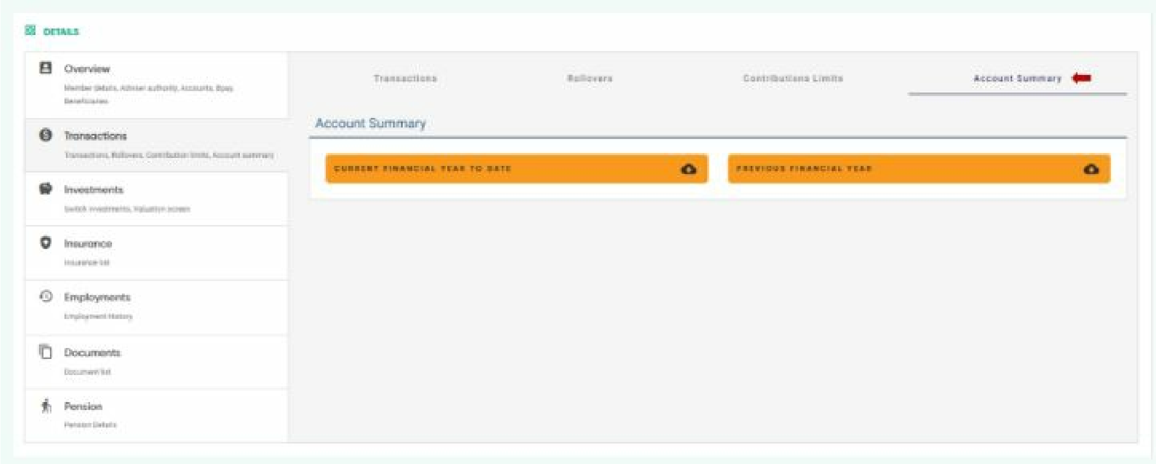


Contribution Limits
This is a tally of contributions to your client's smartMonday account against the Contribution Limits for the current financial year. Note: Any Personal Contributions that have had a tax deduction claimed on them in the current financial year, will be moved from the Non-Concessional total to the Concessional total.



Account Summary

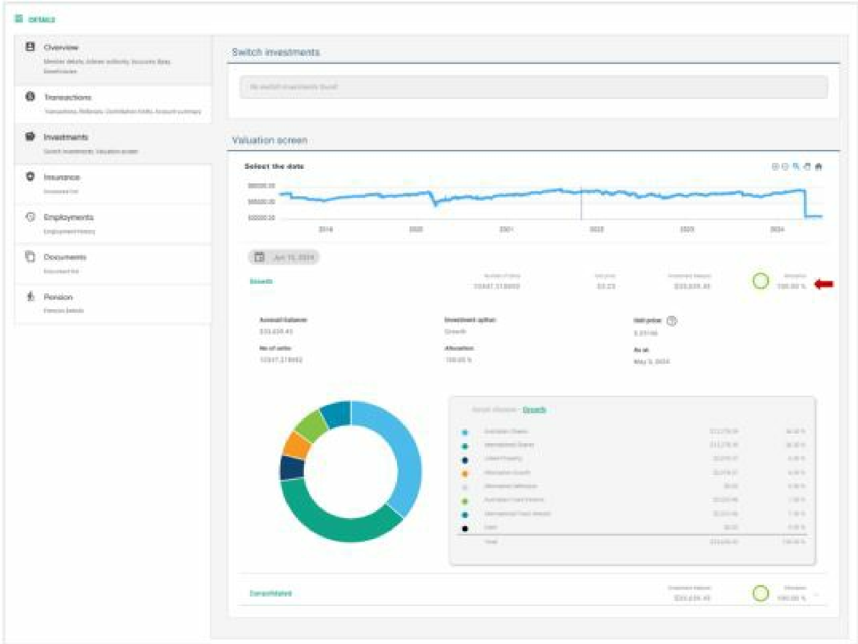
- The account summary section allows you to download a one-page summary of your client's smart Monday account for either the current or previous financial year.
- The summary is produced as a PDF document that you can download. When the orange button is pressed a PDF document will be created and will be available in your download folder.
- The one-page account summary contains the following data.
  - Product
  - Adviser details
  - Member name, address, member number,r, and date joined the fund
  - Investment information as of the current date or final day of the previous financial year dependent on the chosen year
  - Details of insurance cover
  - Member fees (asset administration percentage-based fee and the fixed annual member fee)
  - Beneficiary details
  - Contribution cap amounts for the chosen year
  - Transaction history for the period the account summary relates to



Investments

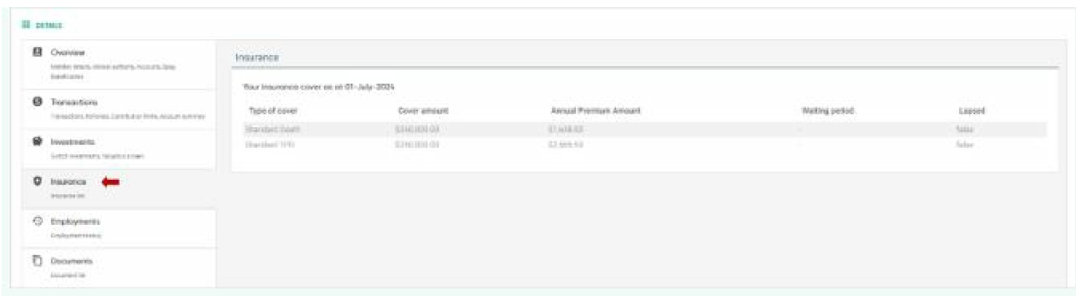
1. The investments page will display switches submitted by you or your client through the Member Portal.
    - The valuation screen shows a graph of your client's smart Monday account balance for the timeframe historical balances are available.
    - By clicking anywhere on the graph, the balance at the date selected is shown. The table at the bottom of the page will update to a listing of the investment options your client's account was invested in at the time.
2. Selecting the drop-down arrow next to the investment option will show the asset classes for the investment option.

   Selecting the drop-down arrow next to the consolidated item will show an overall view of the balance.
3. The data used to create your client's account balance graph is available to be downloaded by selecting the three lines to the right of the graph. Data can be downloaded in SVG, pngPNG CSV format.



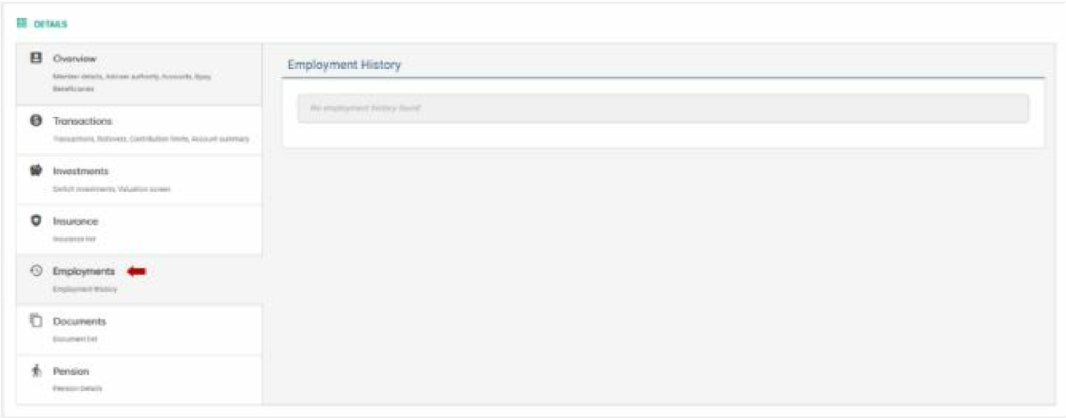
Insurance

- Your client’s current insurance through their smartMonday account will be displayed here. The type of cover, amount of cover, premium amount, and any waiting periods (for IP Cover) will be displayed.
- Each type of cover held will be displayed separately. If your client has a standard and voluntary cover, this will be displayed separately.

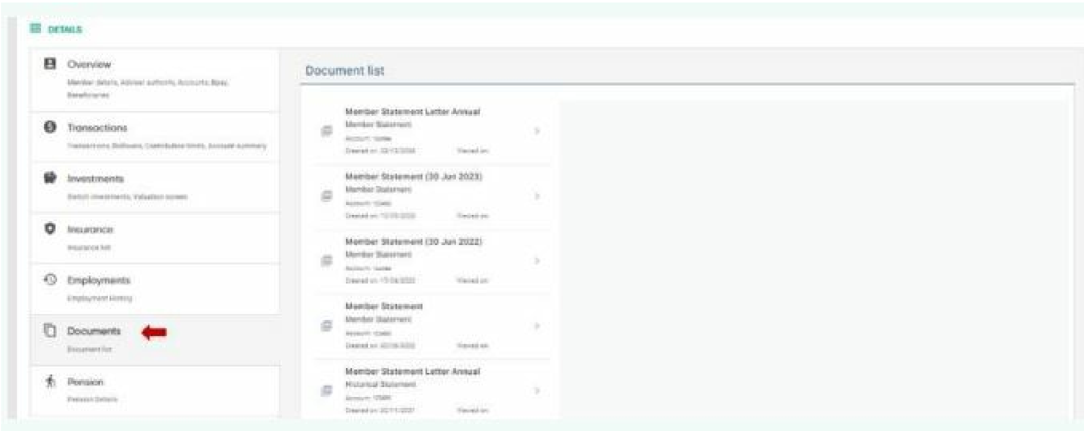


Employment

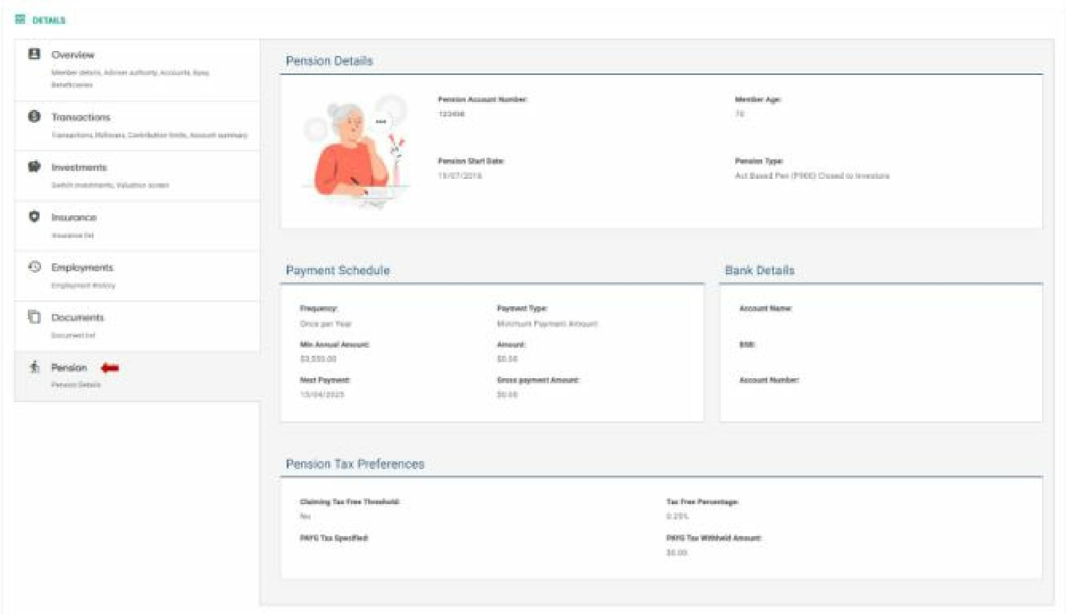
Your client’s employment history will be displayed here.



Documents
All member documents available will be displayed here. Documents can be selected and previewed on this screen or downloaded.



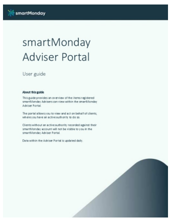
Pension
For your clients with a smart Monday pension account, you will be able to see similar information as detailed above for their pension account in this section.



Got questions?
For questions about the Adviser Portal and member accounts, please call the smart Monday contactcentere on 1300 614 644 from 8.30 am to 5.00 pm (AEST/AEDT), Monday to Frida,y or email

adviser@smartmonday.com.au.

Documents / Resources

 smartMonday Adviser Portal	smartMonday Adviser Portal First Time Set Up [pdf] User Guide Adviser Portal First Time Set Up, Adviser Portal, First Time Set Up, Set Up, Up

References

- User Manual