



MLC Wrap Transfer to Expand

Transaction suspension

Cut-off date

To ensure the successful transfer of your account(s), transactions will be temporarily suspended. The dates below indicate the last day we can accept your requests for certain transactions in the lead up to the transfer. You will be able to resume transacting on Expand from 2 April 2024.

30 January 2024	28 February 2024	10 March 2024	17 March 2024	19 March 2024	24 March 2024	26 March 2024
<ul style="list-style-type: none"> • Buys and sells for any non-daily priced funds • Corporate actions 	<ul style="list-style-type: none"> • Sells of SMAs with managed funds in their model 	<ul style="list-style-type: none"> • SMA transfers • Non-Fast Track: Switch / Reweight • Sell of international shares 	<ul style="list-style-type: none"> • Account closure • Managed fund and SMA purchase from available cash • Managed fund and equity-based SMA sell to cash • Account transfers • Fast Track Switch / Reweight • Contribution splitting* • At limit trades • Term deposits purchase including rollovers • Insurance changes 	<ul style="list-style-type: none"> • Purchase of shares from available cash • Sell shares to cash 	<ul style="list-style-type: none"> • Cash withdrawals • Amending of regular investment, withdrawal, pension facilities 	<ul style="list-style-type: none"> • Additional contribution • Account updates

For more information call us on **132 652**, speak with your financial adviser, or visit myexpand.com.au/faq

PLA-25616 (56941) 0224

* Contribution splitting must be completed prior to the transfer. This is a legislative requirement, not an Expand limitation.

Important: The information has been prepared on behalf of NULIS Nominees (Australia) Limited ABN 80 008 515 633, AFSL 236465 (NULIS), IOOF Investment Management Limited (IIML) ABN 53 006 695 021, AFSL 230524, and Navigator Australia Limited ABN 45 006 302 987, AFSL 236466 (NAL), based on information that is believed to be accurate and reliable at the time of publication. NULIS, IIML and NAL are companies within the Insignia Financial Group which consists of Insignia Financial Ltd ABN 49 100 103 722 and its related bodies corporate. NULIS is the Trustee of the MLC Superannuation Fund, ABN 40 022 701 955, PremiumChoice Retirement Service, ABN 70 479 285 132, and DPM Retirement Service, ABN 40 725 722 496. IIML is the Trustee of the IOOF Portfolio Service Superannuation Fund, ABN 70 815 369 818. NAL is the Service Operator of each Investor Directed Portfolio Service. NULIS, IIML and NAL are companies within the Insignia Financial Group, which consists of Insignia Financial Ltd ABN 49 100 103 722 and its subsidiaries.

EXPAND

