

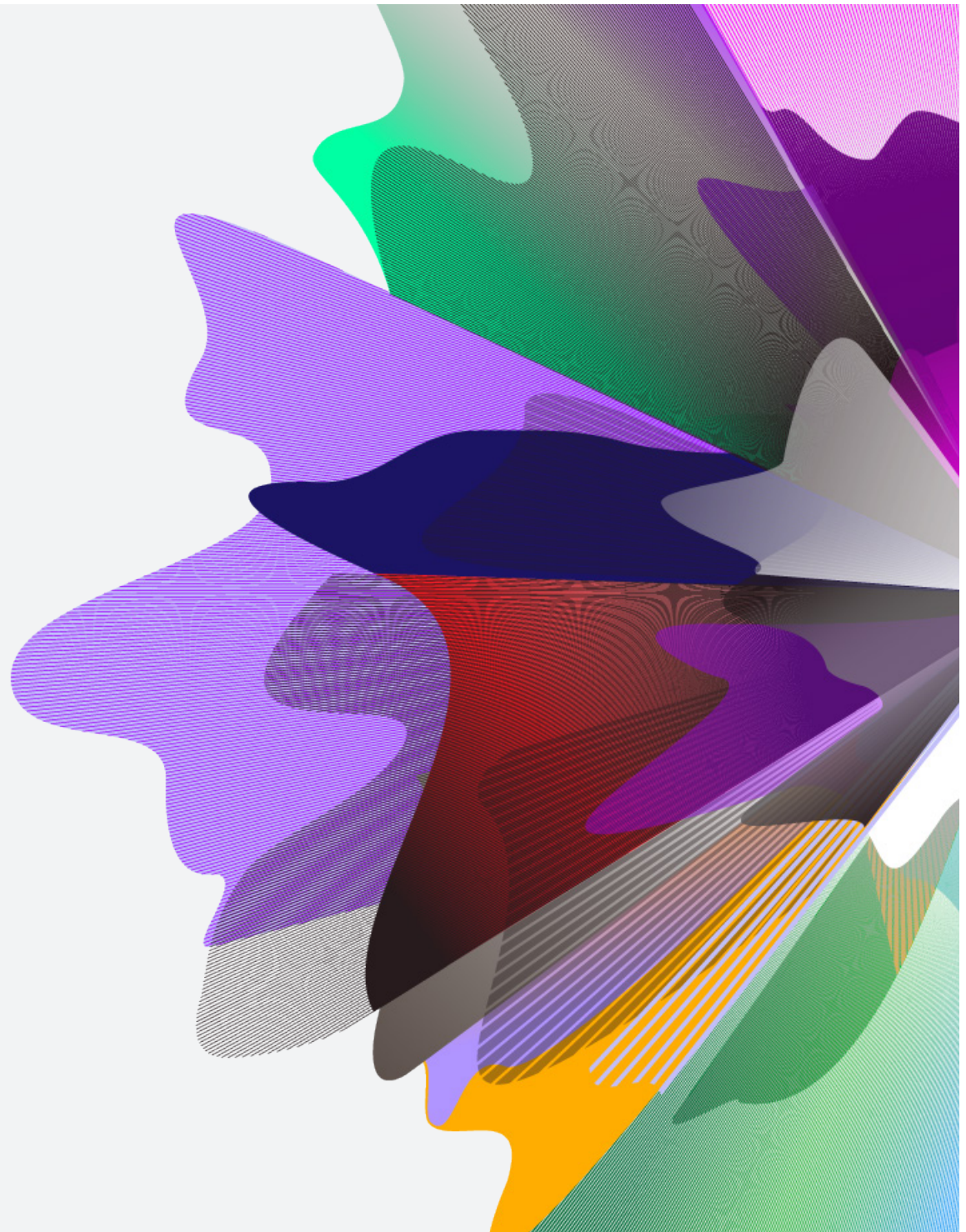


EXPAND

Converting your Expand Account to MLC Retirement Boost

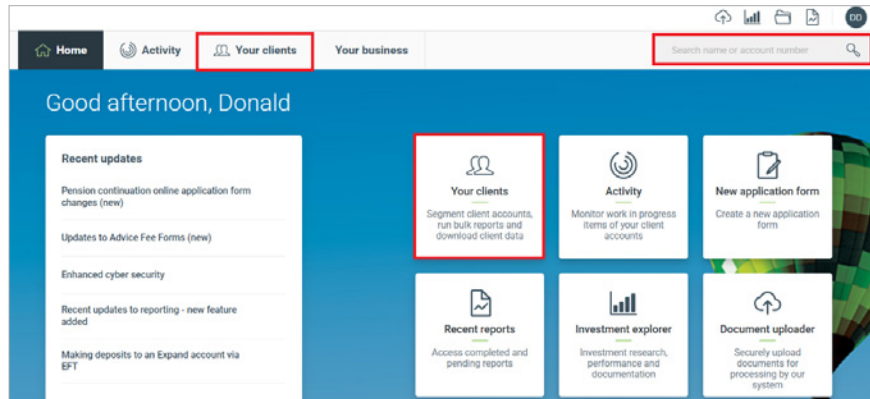
November 2025

FOR ADVISER USE ONLY

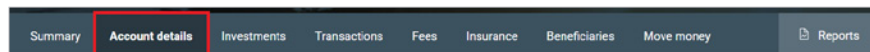


Steps for converting your Expand Account to MLC Retirement Boost™

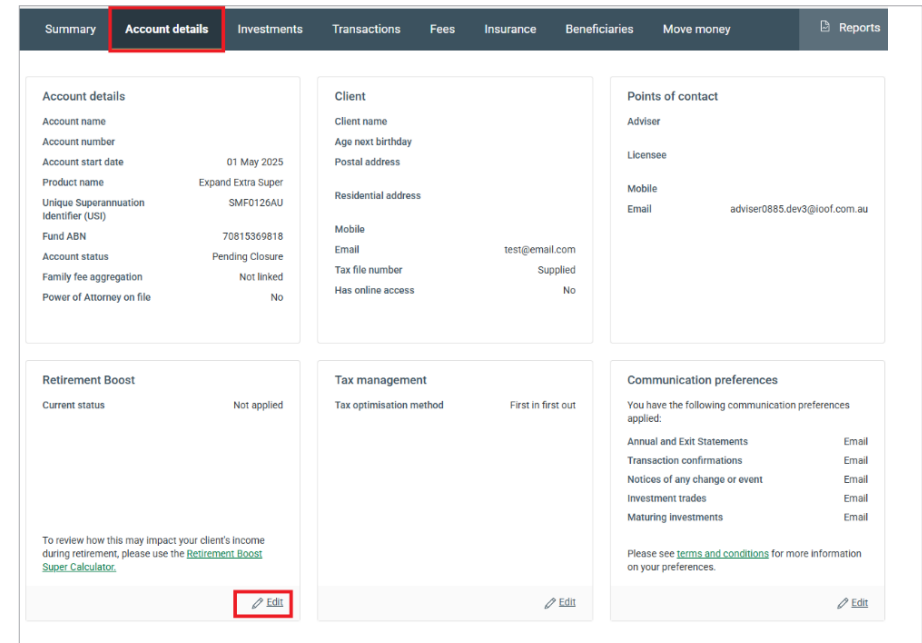
- 1 Navigate to the client via either the **global search** function or the **Your clients** section



- 2 Select the **Account details** tab to navigate to the Retirement Boost™ section



- 3 Under the Retirement Boost™ tile, select **Edit**



4 Select **Generate form**

This form will need to be signed by the client via an original signature or you can use your own electronic signature provider. *Please note, embedded DocuSign through Expand is not currently available for this form.*

What is Retirement Boost?

Retirement Boost (Super) functions like a standard superannuation account, while potentially enabling your clients to access means test **concessions for the Government age pension**.

The earlier your clients begin MLC Retirement Boost (Super), the greater their potential age pension entitlements.

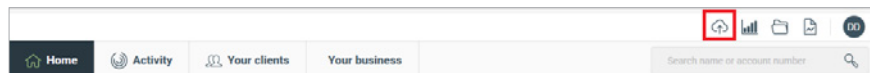
Selecting Retirement Boost is simple

- 1 Download the form
- 2 Return the form via the secure document uploader
- 3 A welcome letter is issued once complete

Use the [Retirement Boost Super Calculator](#) to estimate the potential benefit in accumulation and the [Retirement Boost Optimiser](#) to model strategies aimed at delivering higher retirement income for longer.

Generate form

5 Once signed, you will need to upload via our **Document uploader** function



6 Within the document uploader section, search for the application **client** via their **name or account number**. You will then need to select '**Retirement Boost (Super)**' as the request type.

To upload the document, you can either **browse** your computer or **drag and drop** from a file.

Once your file is uploaded, you can **submit** this to us for processing.

Secure Document Uploader

New Upload Recent Uploads Create Workflow From Document

Client account

Request type

Retirement Boost (Super)

Request summary

Any details to assist in processing this request. Please do not include any personal information. 400

Permitted file types: JPEG, JPG, PNG, GIF, PDF. Filenames cannot exceed 128 characters.

Drop files anywhere to upload

or

Browse Files

Maximum upload file size: 24 MB.

Documents uploaded

No documents uploaded. A document must be uploaded to submit request.

Submit request

7 Please note, your client will receive a combined exit statement and welcome letter.

Your clients existing account number will not change.

Contact us

Postal address

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GPO Box 264
Melbourne VIC 3001

Telephone

1800 517 124

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