November 2025 For adviser use only.

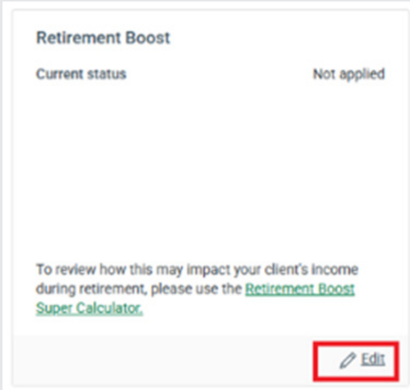
MLC Retirement Boost™ Conversion FAQs for advisers

1. What is the process to covert your existing account to Retirement Boost™?

Convert an eligible existing Expand Standard Super account into a Retirement Boost™ (Super) account with these 3 easy steps:

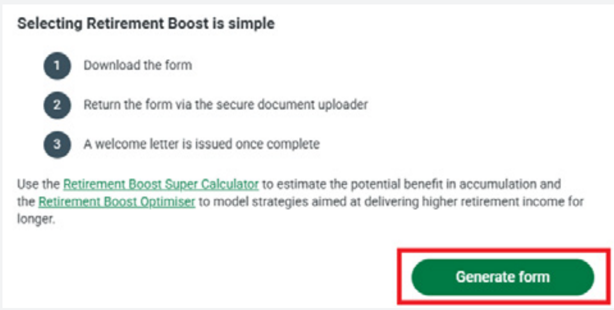
Step 1

Go to the Retirement Boost™ section under Account Details, then click **Edit**.



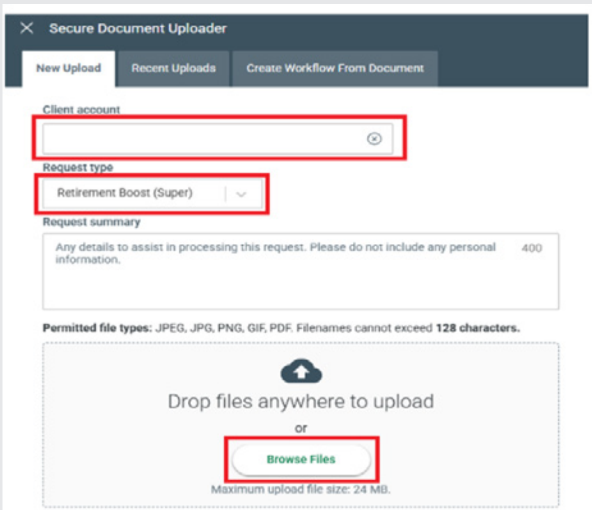
Step 2

- Click **Generate a Form**. This will automatically fill out the required form for you.
- Your client can sign the form via a wet signature or using your own electronic signature provider.



Step 3

Once signed, upload the completed form using the **Secure Document Uploader**.



2. Will my client's account number change?

No, the account number will remain the same.

3. Will transaction and performance history be lost?

No, all transaction and performance history will be retained as the account number remains the same.

4. Do I need to provide a new Adviser Service Fee (ASF) form?

No, the existing ASF arrangement will continue.

5. Will the nomination of beneficiaries carry over?

Yes, the current beneficiary nomination will be maintained.

6. Will standing instructions remain in place?

Yes, all existing standing instructions will continue without change.

7. Will ongoing direct debits and credits be affected?

No, all ongoing contributions will be maintained, including both BPAY and Direct Debit

8. Do employers need new contribution instructions?

No, since the account number remains the same, no changes are required for employer contribution instructions.

9. What pricing will be applied post conversion?

Retirement Boost™ will have the standard PDS rates applied upon conversion, please refer to the PDS for the current rates.

10. Will fee linking need to be re-established in Expand Extra?

No, fee linking will remain in place and does not need to be re-established.

11. What communication will my client receive?

Your client will receive a combined welcome and benefit statements confirming the account is now a Retirement Boost™ (Super) account. This will be sent via your clients preferred comms method and visible online.

12. Can I move an existing Retirement Boost™ (Super) account between Expand Extra or Expand Essential (Super)?

No, the legislation does not allow the purchase amount calculation to be moved between IRIS accounts.

13. Is there a standalone form that can be used to request conversion?

This is an online capability with the simplicity of a prefilled form on your clients' individual account.

14. Which digital signature providers can be used?

Existing approved digital signature providers are accepted. Please ensure when uploading to include the Certificate of completion.

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