

Voyage, Grow Wrap and PortfolioOne are transferring to Expand Extra

Here's a handy checklist to help you and your practice get ready for the transfer.

Actions	Practice notes
To review and complete	
☐ Review any inflight work on Adviser Online.	
☐ Process any switches and/or withdrawals prior to the temporary transaction suspension - see temporary transaction suspension flyer.	
☐ Identify clients with weekly and fortnightly direct debits and/or regular withdrawal arrangements to determine approach. Note: Weekly and fortnightly recurring direct debits and/or regular withdrawal arrangements will cease on transfer to Expand Extra.	
☐ Review clients with DRP for listed securities and determine approach. Note: DRP will be removed from client's current accounts from 10 July. If a client has a DRP instruction on some or all of their listed securities, we will not be able to bring this instruction across to Expand Extra.	
☐ Review CPI on group insurance as this functionality is not offered in Expand.	
☐ Review clients with dollar cost averaging and determine approach. Note: Dollar cost averaging facility is not available in Expand Extra and will cease on transfer	
☐ Review clients with auto reweights and determine approach. Note: To avoid any unintended consequences (such as selling down listed security holdings), any automatic rebalancing instruction will not be transferred to Expand Extra.	
☐ Identify clients with advice fees on specific asset classes as these arrangements will cease on transfer.	
For advisers not currently using Expand	
☐ Once you have your Expand code, login into the Expand adviser portal	
☐ Register for Expand training	
☐ Determine and set up support user access	
☐ Request a new data feed for Expand from your financial planning software provider	

For more information on the transfer:

contact your **Business Development Manager or Relationship Training Manager.**

Important: The information in this flyer is intended for financial advisers only and is not to be distributed to clients.

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