# 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.<br>**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.<br>**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.<br>**Note:** Dollar cost averaging facility is not available in Expand Extra and will cease on transfer | |
| ☐ Review clients with auto reweights and determine approach.<br>**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 | |

Grow Wrap PortfolioOne Voyage

## For more information on the transfer:

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



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