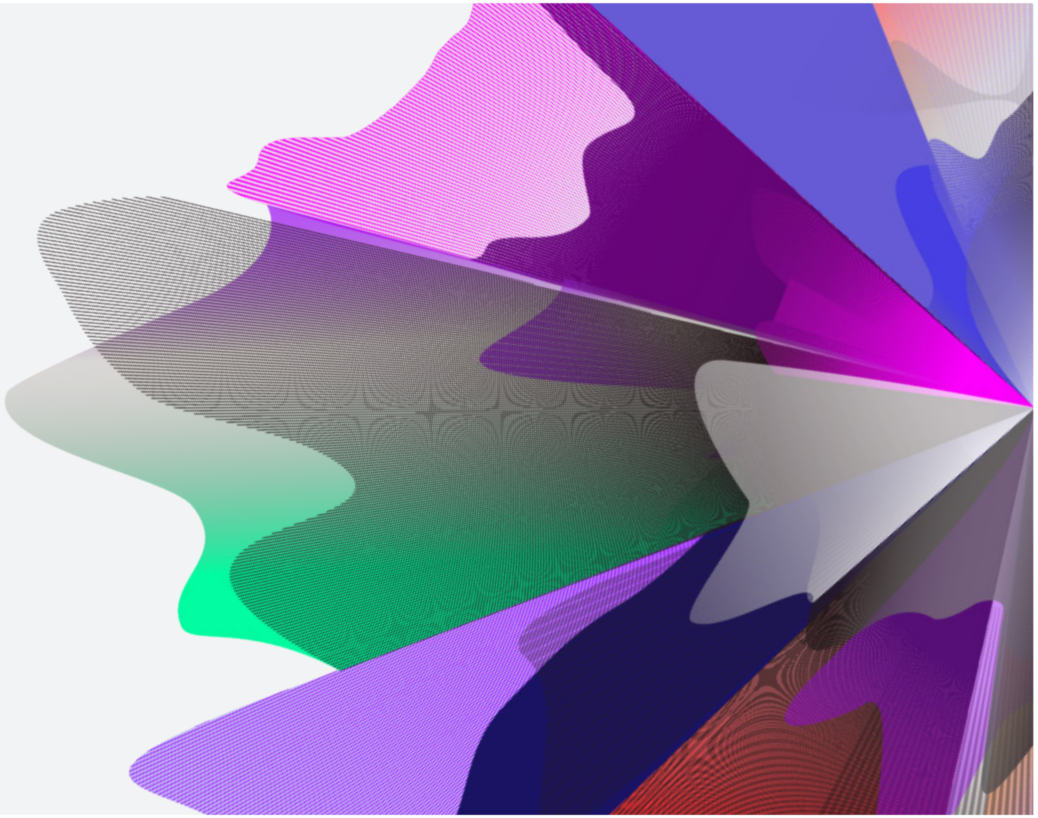
EXPAND



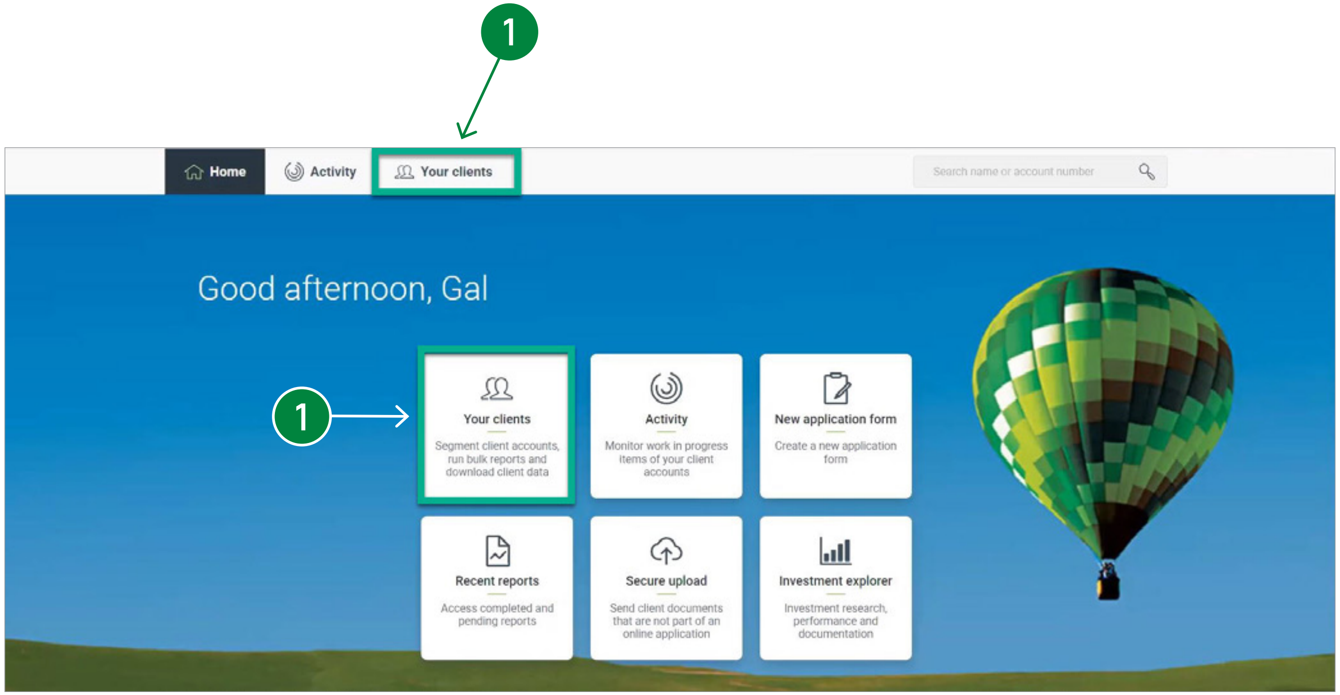
Expand Functionality – Nominating beneficiaries

September 2023
myexpand.com.au

Nominating beneficiaries

1 To make a beneficiary nomination to an account, you can search for the account by name or number through **Your clients**.

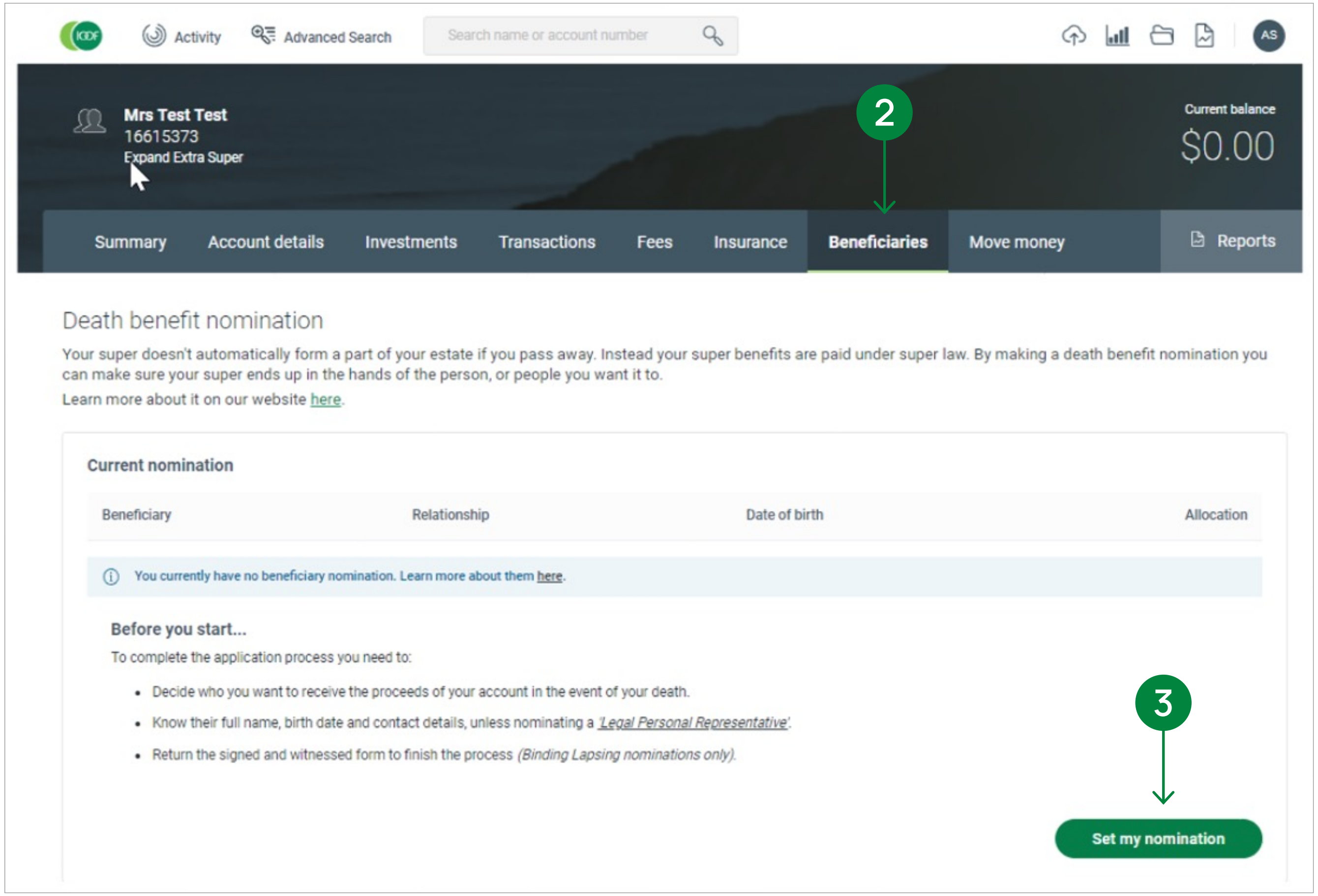
Your clients is a way to both look at your entire account listing and utilise the categories at the top to filter down accounts for running reports and extracting data based on your search criteria.



Nominating beneficiaries (cont.)

2 From the account Summary page, navigate to the Beneficiaries page. The details of any current account beneficiary nomination is displayed in this section.

3 To nominate a beneficiary, select the **Set my nomination** button.



Nominating beneficiaries (cont.)

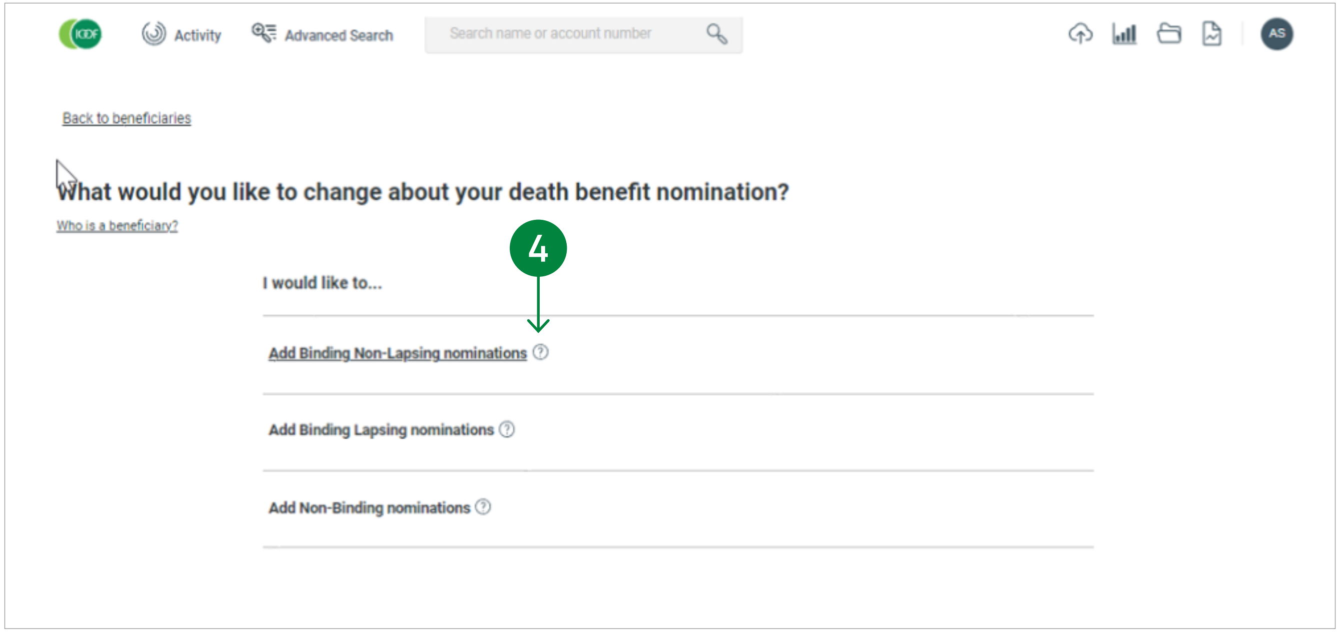
4 Select the type of nomination to be made on the selected account:

a) **Binding non-lapsing nominations**

b) **Binding Lapsing nominations**

c) **Non-binding nominations**

For more information on understanding the different beneficiary nominations available, click on the **?** Icon.



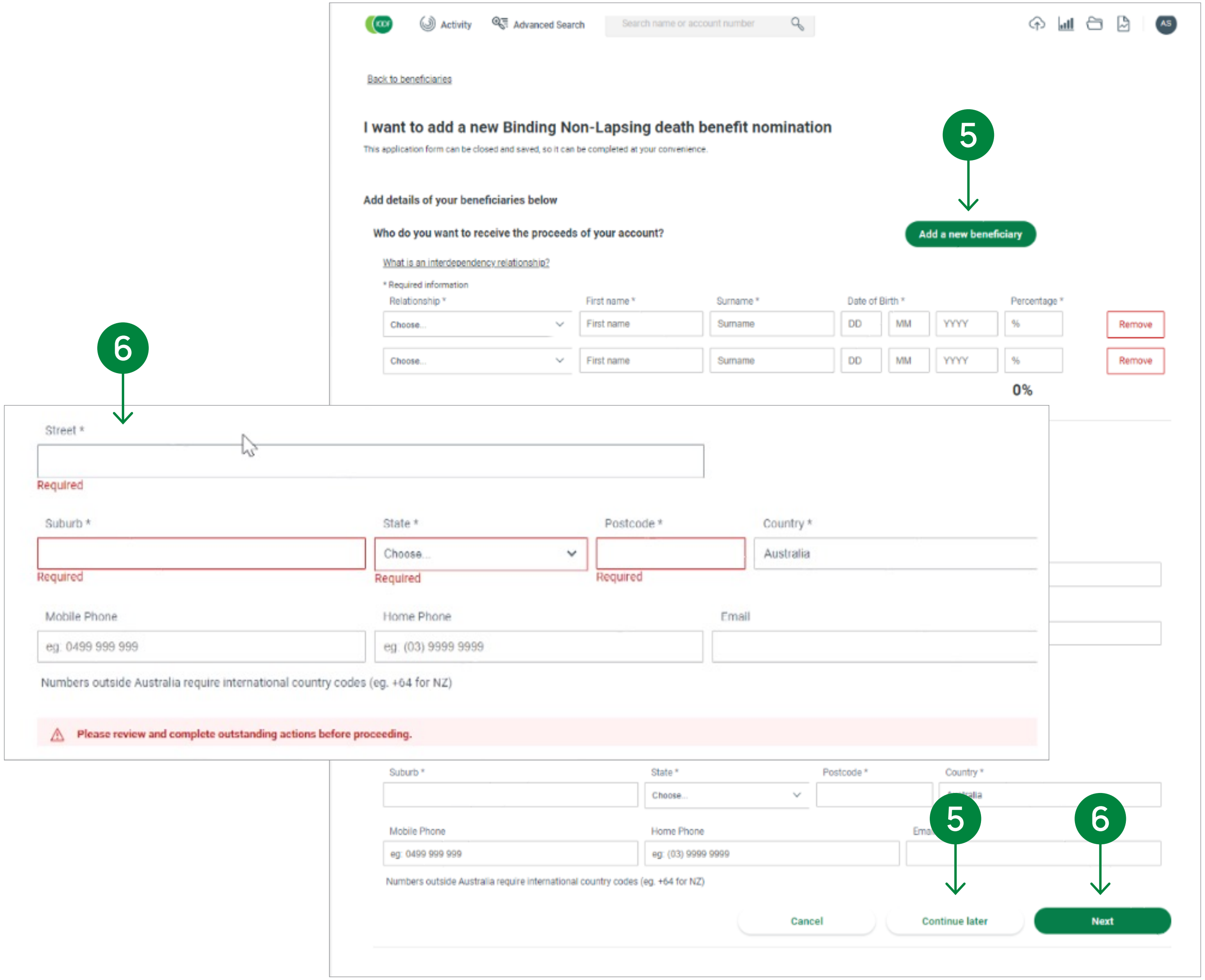
Nominating beneficiaries (cont.)

5 Next, add the beneficiaries for nomination on the account. Select the **Add a new beneficiary** button to apply multiple beneficiaries. When adding multiple beneficiaries, ensure that the percentage totals to 100%.

Beneficiary details can be saved and returned to the draft by selecting the Continue later button.

6 When all details are entered for each beneficiary nomination, click on **Next**.

If there are any outstanding information required, this will be highlighted to be addressed.

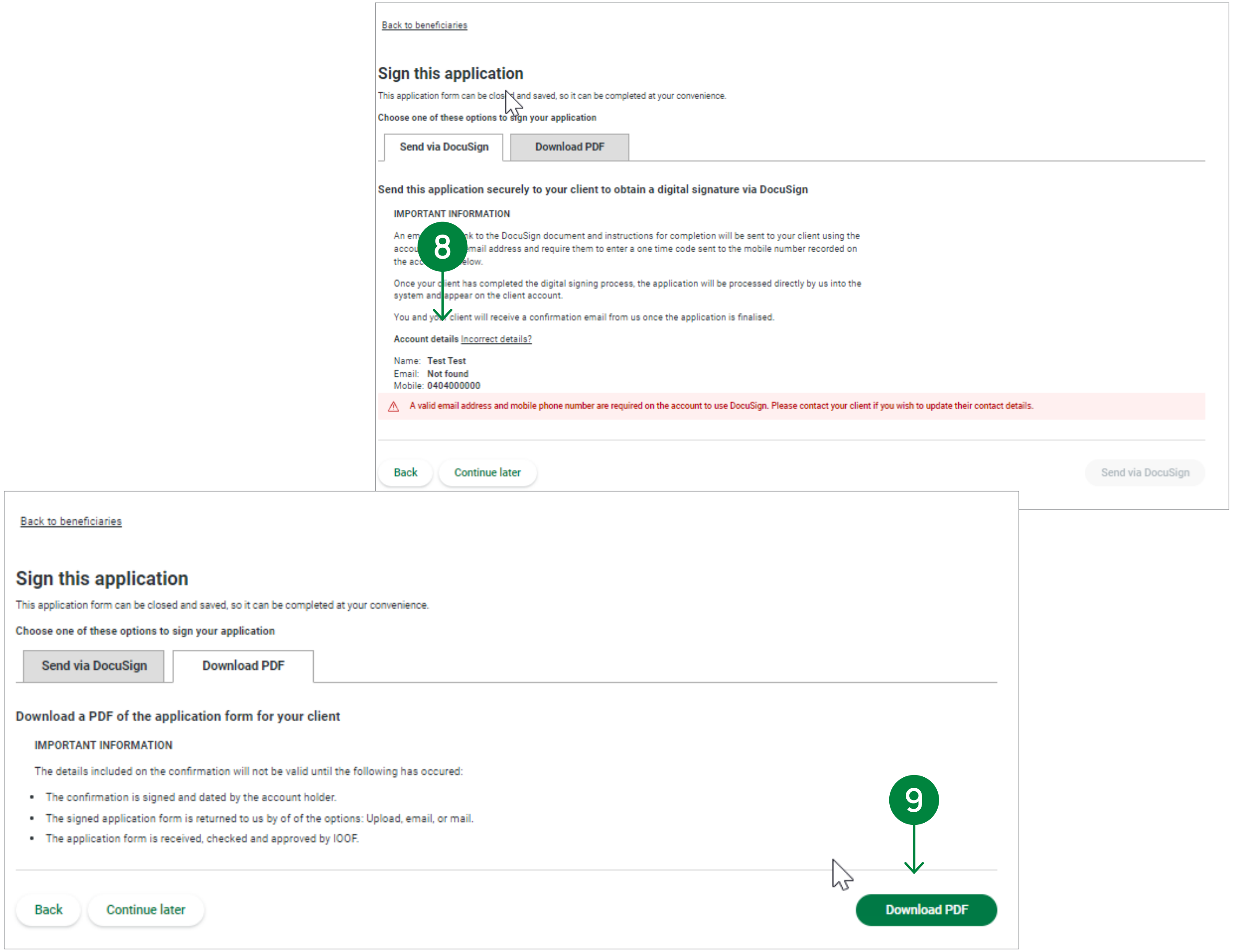


Nominating beneficiaries (cont.)

7 Next step is to organise signed confirmation to complete the Beneficiary Nomination. This can be organised via DocuSign or by downloading the PDF.

8 Sending the Beneficiary Nomination via Docusign, you will need to ensure your client's account details are correct.

9 When downloading the PDF for signed confirmation, it can be returned to us for processing by upload, email or post.



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