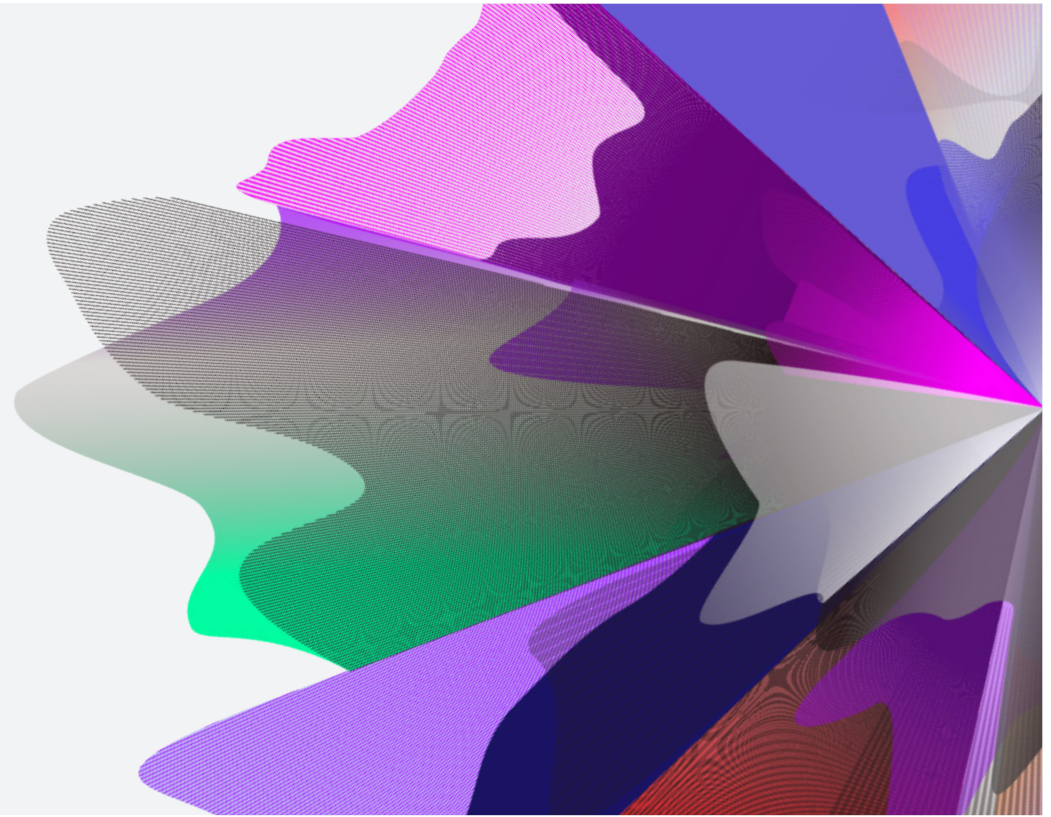


EXPAND



Expand Functionality – Nominating beneficiaries

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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.

The screenshot displays a web application interface with a navigation bar at the top containing 'Home', 'Activity', and 'Your clients' (highlighted with a green box and a green circle with the number '1' pointing to it). A search bar on the right of the navigation bar contains the text 'Search name or account number' and a magnifying glass icon. Below the navigation bar, the main content area has a blue background with the text 'Good afternoon, Gal' on the left. On the right, there is a large image of a hot air balloon. In the center, there is a grid of six white cards, each with an icon and a title. The 'Your clients' card is highlighted with a green box and a green circle with the number '1' pointing to it. The cards are: 'Your clients' (Segment client accounts, run bulk reports and download client data), 'Activity' (Monitor work in progress items of your client accounts), 'New application form' (Create a new application form), 'Recent reports' (Access completed and pending reports), 'Secure upload' (Send client documents that are not part of an online application), and 'Investment explorer' (Investment research, performance and documentation).

Nominating beneficiaries (cont.)

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

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

The screenshot shows the IODF account interface. At the top, there is a navigation bar with icons for Activity, Advanced Search, and a search box. The account holder's name, Mrs Test Test, and account number, 16615373, are displayed. The current balance is \$0.00. The navigation bar includes tabs for Summary, Account details, Investments, Transactions, Fees, Insurance, Beneficiaries, Move money, and Reports. The Beneficiaries tab is highlighted. Below the navigation bar, the section is titled 'Death benefit nomination' and contains explanatory text. A table titled 'Current nomination' shows no current nominations. Below the table, there is a section titled 'Before you start...' with a list of steps to complete the nomination process. A green button labeled 'Set my nomination' is located at the bottom right of the page.

Current nomination

Beneficiary	Relationship	Date of birth	Allocation
<p>① You currently have no beneficiary nomination. Learn more about them here.</p>			

Before you start...

To complete the application process you need to:

- Decide who you want to receive the proceeds of your account in the event of your death.
- Know their full name, birth date and contact details, unless nominating a *Legal Personal Representative*.
- Return the signed and witnessed form to finish the process (*Binding Lapsing nominations only*).

Set my nomination

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.

Back to beneficiaries

What would you like to change about your death benefit nomination?

[Who is a beneficiary?](#)

I would like to...

[Add Binding Non-Lapsing nominations ?](#)

[Add Binding Lapsing nominations ?](#)

[Add Non-Binding nominations ?](#)

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.

The screenshot shows a web interface for nominating beneficiaries. At the top, there is a navigation bar with 'Activity', 'Advanced Search', and a search input. Below this, a 'Back to beneficiaries' link is visible. The main heading is 'I want to add a new Binding Non-Lapsing death benefit nomination', with a sub-note: 'This application form can be closed and saved, so it can be completed at your convenience.' A green circle with the number '5' points to an 'Add a new beneficiary' button. Below this, the section 'Add details of your beneficiaries below' asks 'Who do you want to receive the proceeds of your account?'. It includes a dropdown for 'Relationship *' and two rows of input fields for 'First name *', 'Surname *', 'Date of Birth *' (DD, MM, YYYY), and 'Percentage *'. A 'Remove' button is next to each row. The total percentage is shown as '0%'. A green circle with the number '6' points to the 'Street *' field in a detailed address form below. This form includes fields for 'Suburb *', 'State *', 'Postcode *', and 'Country *' (pre-filled with 'Australia'). It also has fields for 'Mobile Phone', 'Home Phone', and 'Email'. A red border highlights the 'Suburb *', 'State *', and 'Postcode *' fields, indicating they are required. A red warning message at the bottom of the form reads: 'Please review and complete outstanding actions before proceeding.' At the bottom of the page, there are three buttons: 'Cancel', 'Continue later', and 'Next'. A green circle with the number '5' points to the 'Continue later' button, and a green circle with the number '6' points to the 'Next' button.

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.

[Back to beneficiaries](#)

Sign this application

This application form can be closed and saved, so it can be completed at your convenience.

Choose one of these options to sign your application

[Send via DocuSign](#) [Download PDF](#)

Send this application securely to your client to obtain a digital signature via DocuSign

IMPORTANT INFORMATION

8 An email link to the DocuSign document and instructions for completion will be sent to your client using the account email address and require them to enter a one time code sent to the mobile number recorded on the account below.

Once your client has completed the digital signing process, the application will be processed directly by us into the system and appear on the client account.

You and your client will receive a confirmation email from us once the application is finalised.

[Account details](#) [Incorrect details?](#)

Name: Test Test
Email: Not found
Mobile: 0404000000

⚠ A valid email address and mobile phone number are required on the account to use DocuSign. Please contact your client if you wish to update their contact details.

[Back](#) [Continue later](#) [Send via DocuSign](#)

[Back to beneficiaries](#)

Sign this application

This application form can be closed and saved, so it can be completed at your convenience.

Choose one of these options to sign your application

[Send via DocuSign](#) [Download PDF](#)

Download a PDF of the application form for your client

IMPORTANT INFORMATION

The details included on the confirmation will not be valid until the following has occurred:

- The confirmation is signed and dated by the account holder.
- The signed application form is returned to us by of of the options: Upload, email, or mail.
- The application form is received, checked and approved by IOOF.

[Back](#) [Continue later](#) [Download PDF](#)

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Contact us

Postal address

Expand
GPO Box 264
Melbourne VIC 3001

Telephone

1800 517 124

Email

clientfirst@myexpand.com.au
advisoryrelationships@insigniafinancial.com.au

Website

myexpand.com.au

Service Operator

Navigator Australia Limited
ABN 45 006 302 987
AFSL 236466

Registered address

Level 1, 800 Bourke Street
Docklands VIC 3008

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