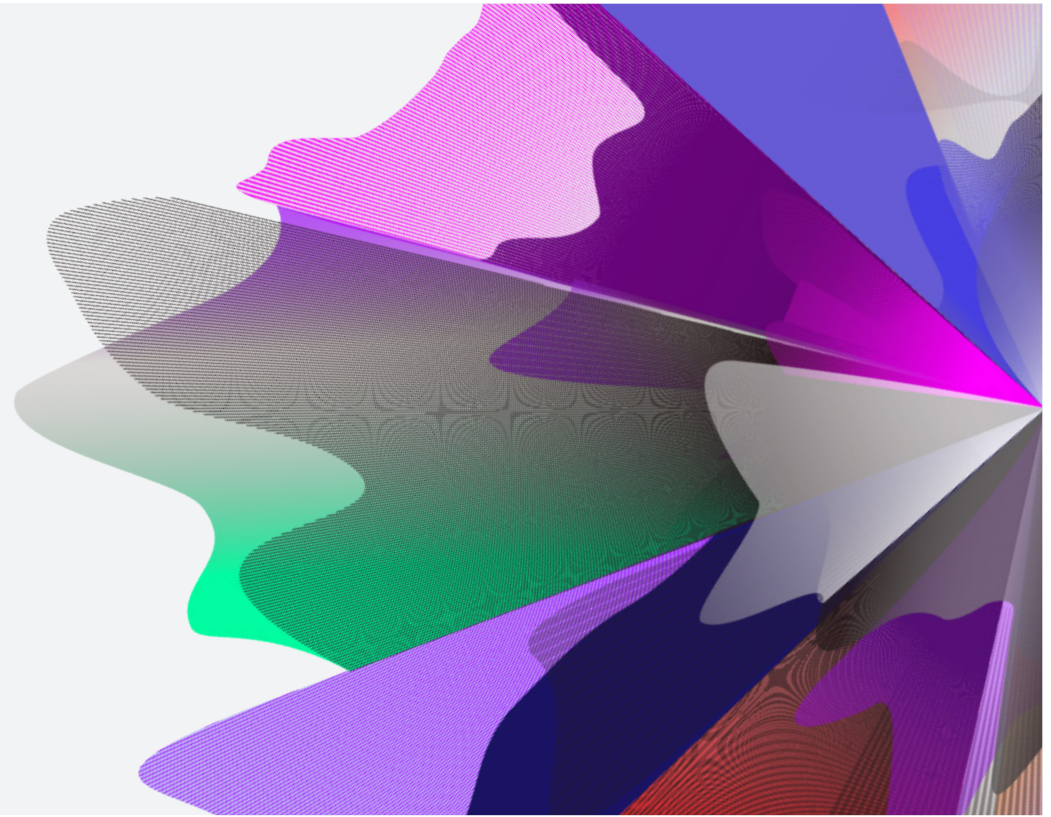


EXPAND



## Expand Functionality – Move money: Additions

September 2023  
[myexpand.com.au](http://myexpand.com.au)

# Move Money: Additions

- 1 To make an addition 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 dashboard interface. At the top, there is a navigation bar with three main menu items: 'Home', 'Activity', and 'Your clients'. The 'Your clients' item is highlighted with a green box, and a green callout bubble containing the number '1' has an arrow pointing to it. To the right of the navigation bar is a search bar with the placeholder 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 greeting 'Good afternoon, Gal'. On the right side of this area 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 callout bubble containing the number '1' with an arrow pointing to it. The other cards are: '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).

## Move Money: additions (cont.)

**2** Once the account is selected, from the **Summary** screen, navigate to the **Move Money** tab.

**3** For Super accounts, in the **Contributions and consolidation** section, there are five ways to make a contribution.

The most convenient option to make a contribution is via **BPAY**. **Biller code** details and **reference numbers** per contribution type are available to make a contribution.

The other options available can be made by selecting the appropriate link to download the contribution form. They are:

**a Request transfer from another fund**

Use this form to transfer monies from another superannuation fund or income stream into Expand Essential Super or Expand Extra Super.

**b Make an additional lump sum contribution**

Use this form to make the following lump sum contribution: Personal, Spouse, Downsizer, Personal Injury Payment and a CGT small business contribution.

**c Direct debit request**

Use this form to make a one-off direct debit, set up or change an ongoing direct debit and cancel any existing direct debits.

**d Choice of fund for employer contributions**

Use this form to nominate the Expand Essential Super or Expand Extra Super to become the chosen fund.

The forms available can be completed online and emailed or uploaded via the **Secure document uploader**.

**Mr Nicholas Trevor Abdul Rasheed**  
16590755  
Expand Essential Super

Account performance (net) -11.65%  
Current balance \$144,952.69

Summary Account details Investments Transactions Fees Insurance Beneficiaries **Move money** Reports

Online withdrawals are not available for this account. For information about online withdrawal eligibility please consult the [online withdrawals user guide](#) or contact us.

### Withdrawals and contributions

[Make a withdrawal](#)

**Nominated bank account**

Prior to undertaking an online withdrawal your client must nominate a bank account by completing the Nomination of Financial Institution form.

[Download Nomination of Financial Institution form](#)

**Available cash**

\$-1,598.38

Pending estimated investment value: \$10,780.91

Not enough cash?  
If there is not enough cash available to withdraw, you can choose which assets to sell on the [investments page](#).

[Go to standing instructions](#)

**Contributions and consolidation**

**Make a contribution**

Biller code 364455

BPAY® Contribution information			
Contribution type	Contributor	Reference number	
Personal	You	165907552	
Spouse	Your spouse	965907552	

**Contribution forms**

- [Request transfer from another fund](#)
- [Make an additional lump sum contribution](#)
- [Direct debit request](#)
- [Choice of fund for employer contributions](#)

## Move Money: additions (cont.)

- 4** For Investment accounts, in the **Withdrawals and deposits** section, **BPAY** details are available to make a deposit and you can select the **Direct Debit Request form** to make a one-off direct debit, set up or change an ongoing direct debit and cancel any existing direct debits.

The Direct Debit Request form is available for Super, Pension and Investment accounts.

The screenshot displays the 'Withdrawals and deposits' page for Mr. Janifer Howell Absolon's Expand Extra Investment account. The account performance is -3.24% and the current balance is \$40,278.25. The 'Move money' tab is selected in the navigation bar. The 'Make a Deposit' section features a BPAY logo (circled with a green '3') and provides the following details: BPAY®, Biller code 83972, and Reference number 166073818. The 'Available cash' is \$18,134.04, with a pending estimated investment value of \$600.00. A 'Not enough cash?' warning is present, with a 'Go to standing instructions' link (circled with a green '4'). Below this are sections for 'Regular withdrawals' (with a 'Setup a regular withdrawal plan' link) and 'Regular deposits' (with a 'Direct Debit Request form (PDF)' link). The 'Recent withdrawal history' table is currently empty, showing a message: 'There are no recent withdrawals on this account.'

Submitted	Gross (\$)	Tax (\$)	Net (\$)	Account name Account number	Status	Submitted by	Documents
There are no recent withdrawals on this account.							

# Move Money: additions (cont.)

Shown here are examples of contribution forms.

The image displays four screenshots of EXPAND contribution forms, each with a green circle containing a letter (a, b, c, d) pointing to a specific section:

- a) Request to Transfer:** This form includes sections for 'Important information', 'Step 1: Your personal details' (with fields for Title, Given name(s), Surname, Mailing address, State, Postcode, Date of birth, and Unique Superannuation Identifier (USI)), and 'Please provide the Super account number that will receive the transfer of super benefit below'.
- b) Additional Lump Sum Contribution - Super:** This form includes 'Step 1: Member details' (Account number, Title, Given name(s), Surname, Date of birth) and 'Step 2: Contribution payment information' (Personal contribution, Spouse contribution, Downstream contribution, Personal Injury Payment, OCT small business contributor, Total).
- c) Direct Debit Request:** This form includes 'Step 1: Account details' (Account number, Date of birth), 'Step 2: Financial institution details' (Name of financial institution, Account name, BSB, Account number), and 'Step 3: One-off initial direct debit details' (Frequency, Date of first debit, Amount to be debited from account).
- d) Choice of fund:** This form includes 'Step 1: request that all future superannuation contributions be made to' (My own choice of fund), 'Step 2: Your chosen fund details' (Account number, Title, Given name(s), Surname, Date of birth, Fund Australian business number (ABN), Unique Superannuation Identifier (USI)), 'Step 3: I have attached' (checkbox for trustee statement and evidence from trustee), and 'Step 4: Employee name and signature' (Employee name, Employee number, Signature, Date).

**HINT:** Completed forms can be sent to Expand via the **Secure document uploader**.

The screenshot shows the EXPAND web interface. In the top right corner of the navigation bar, there is a 'Secure document uploader' icon, which is a square containing a document icon and a circular arrow. A green arrow points from the 'HINT' box to this icon. Below the navigation bar, the 'Request type' dropdown menu is visible, with 'Please select one...' as the current selection.

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# EXPAND

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