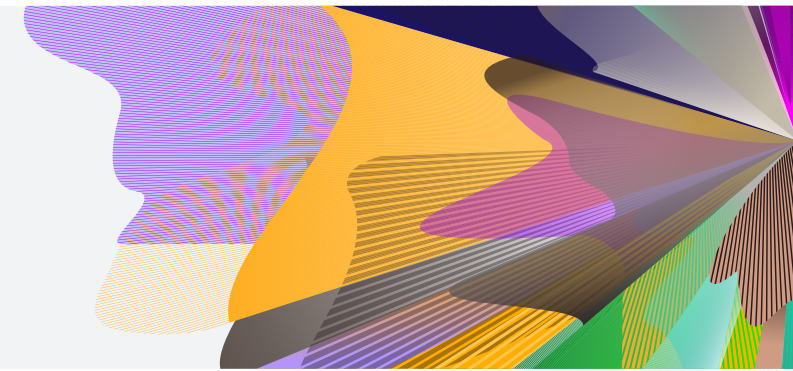




EXPAND

Voyage, Grow Wrap and PortfolioOne transfer to Expand Extra

Post-migration checklist



Here's a handy checklist to help you and your practice after the transfer of Voyage, Grow Wrap and PortfolioOne to MLC Expand.

Actions	How to get started
To get started with MLC Expand	
☐ Log in to the MLC Expand adviser portal	Visit myexpand.com.au and click 'Login'
☐ Enable data feeds via the MLC Expand adviser portal/Online Profile	View the Setting up your Xplan data feed guide
☐ Request a new data feed for MLC Expand from your financial planning software	
☐ Set up support staff and their permissions on the MLC Expand adviser portal via Online Profile	View the Create and manage your support user's online access guide
☐ Learn more about MLC Expand	Visit myexpand.com.au/adviser
☐ Access our Platform guides via the MLC Expand adviser portal	Visit myexpand.com.au , login and navigate to the lightbulb icon
☐ View the 'Transfer Webinar' video via the transfer microsite	Register for myexpand.com.au/transfer
☐ Encourage clients to register for online access to MLC Expand and download the Expand App from the App Store or on Google Play	Download the client flyer 'Keep on top of your account on the go'
☐ Understand key product differences	Read the product transfer guides • Super/pension • IDPS
To review and action – client accounts	
☐ Review re-investment, standing instructions and automatic facility settings, pension payment and withdrawal details, Cash Account preferences and beneficiaries via Activity/Business Reporting/Standing Instructions	Refer to the how to guides and videos
☐ Remind clients to update their employers with the USI SMF0126AU and their new account number. A pre-populated Choice of Fund form can be downloaded from the adviser and client portals under 'Move Money'.	
☐ New BPAY® and EFT details for clients can be obtained from the adviser and client portals under the 'Move Money' page.	
☐ Reinstate automatic reweights	

Actions		How to get started
☐ Provide external insurance providers with new account information to reinstate ongoing rollovers		
☐ Review advice fee arrangements via the MLC Expand adviser portal by going to Reports/CSV/Advice Fees		Visit myexpand.com.au , log in and navigate to Your clients and select Reports
☐ Action any transactions deferred due to the transaction suspension periods		View the Transaction suspension flyer
☐ Ensure any new accounts are linked to existing fee groups (if relevant) via the MLC Expand adviser portal		Visit myexpand.com.au , log in, navigate to your client's account and select the Fees tab
To access client information		
☐ Client welcome letters will be available in the communications archive via the MLC Expand adviser portal shortly after the transfer		Visit myexpand.com.au , log in and navigate to your client's account. Recent communications are shown on the Account details tab.
☐ Historical statements will be available shortly after the transfer in the Recent communications section via the MLC Expand adviser portal		
☐ View historical transaction history (before 31 December 2026) via Voyage/Grow adviser portals		

For assistance with any of these actions:

Call your Business Development Manager or Relationship Manager

Email advisoryrelationships@mlc.com.au

View [our How to videos](#)

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