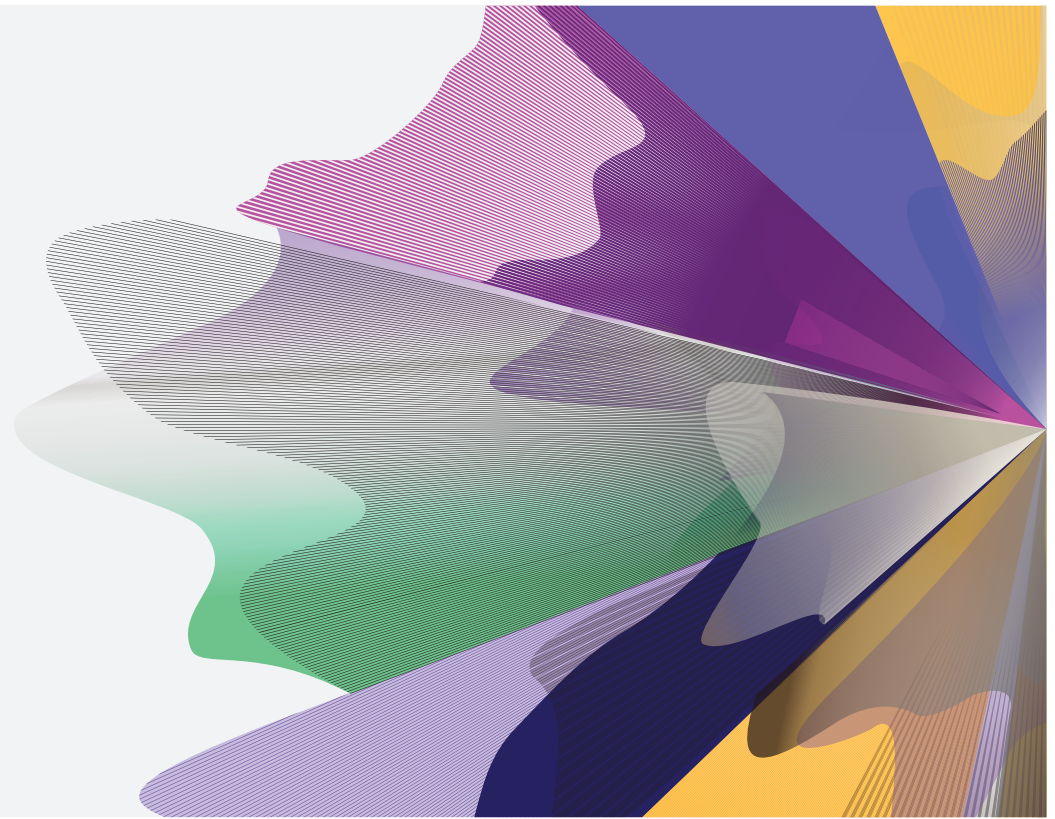




EXPAND

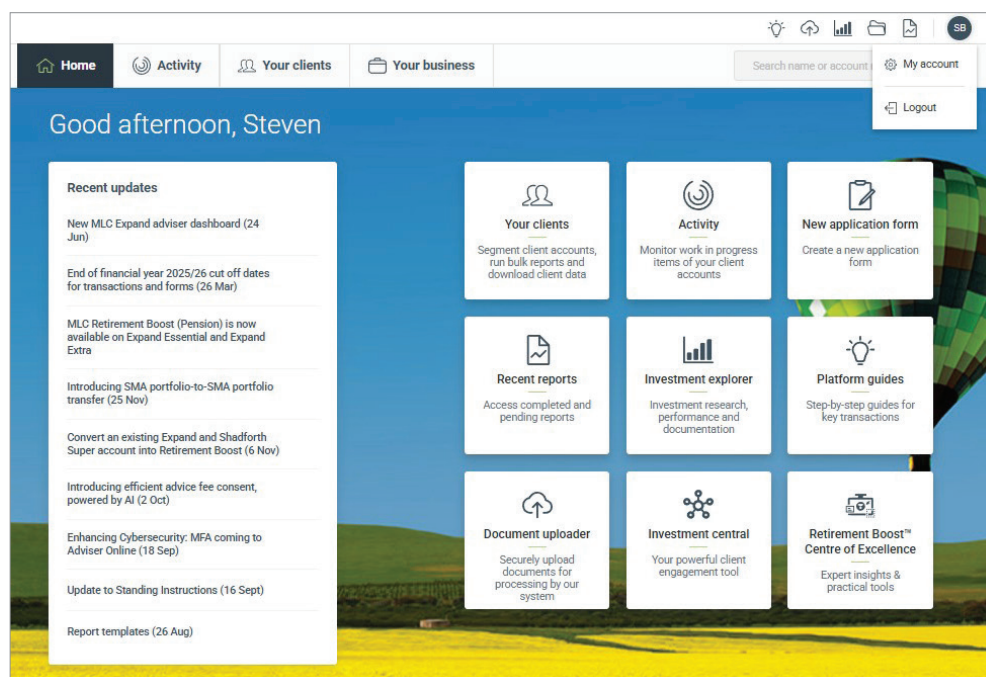


Setting up and managing data feeds

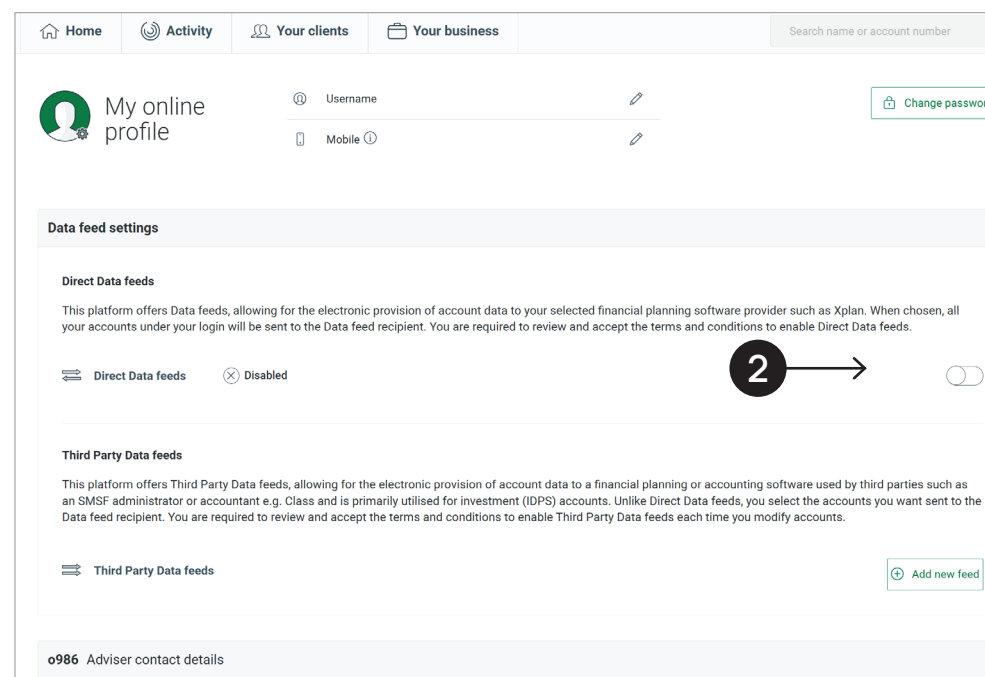
October 2026
myexpand.com.au

Adviser data feeds

- 1 On the top right-hand corner, select the icon with your adviser initials to access the **My account** menu.



- 2 Under Data Feed Settings, select the toggle to display the tick ✓ to enable the feed.



- 3 You will be asked to review and accept the Terms and Conditions. If you accept, input your password to proceed and select **Enable**.

Enable Data Feeds

Corporate, do not provide any warranty, make any representation as to, or accept any responsibility for, errors or omissions (including negligence), or for the accuracy, reliability, timeliness or completeness of the information in the Data Feeds.

- To the extent permitted by law, IIML, NAL and their related bodies corporate are excluded from any liability for any loss, costs, charges and expenses suffered or incurred by you directly or indirectly arising as a result of use of this data, including any loss you or your clients may incur as a result of the Data Feed Recipient's use or misuse of information it receives from the Data Feeds.
- You acknowledge that the Data Feeds may cease to be offered, or your access to them may be terminated or temporarily suspended, at any time, without notice. Without limiting this right to terminate or suspend the service, you acknowledge that we terminate or suspend your access to the Data Feed Service in the event that we are informed or reasonably believe that:
 - you have had your Australian Financial Services Licence (AFSL) varied, suspended or cancelled
 - you are otherwise no longer authorised to deal in or provide advice in relation to our products or
 - you are no longer an authorised representative of your AFSL Licensee.
- We will cease to provide the Data Feeds to you in relation to a particular client if we are advised or reasonably believe that you are no longer the nominated servicing adviser to that client.
- Any personal information held by IIML, NAL or their related bodies corporate will be handled in accordance with the privacy policy at insigniafinancial.com.au/privacy.

Please enter your password to proceed

•••••••• Show

Enable

- 4 Within Direct Data feeds, select **Add new feed**.

Data feed settings

Direct Data feeds

This platform offers Data feeds, allowing for the electronic provision of account data to your selected financial planning software provider such as Xplan. When chosen, all your accounts under your login will be sent to the Data feed recipient. You are required to review and accept the terms and conditions to enable Direct Data feeds.

Direct Data feeds ✓ Enabled

Create a new Data feed
Send your clients data to your financial planning software.

Add new feed

Third Party Data feeds

This platform offers Third Party Data feeds, allowing for the electronic provision of account data to a financial planning or accounting software used by third parties such as an SMSF administrator or accountant e.g. Class and is primarily utilised for investment (IDPS) accounts. Unlike Direct Data feeds, you select the accounts you want sent to the Data feed recipient. You are required to review and accept the terms and conditions to enable Third Party Data feeds each time you modify accounts.

Third Party Data feeds Add new feed

Setting up data feeds with your advice software provider

You will also need to set up data feeds with your advice software provider. Please contact your advice software provider for set up support.

- 5
- Select your Data feed provider.
 - Multi-factor authentication is then required to proceed to **Step 6**.

5 →

Step 1 of 4
New Data feed

Select financial planning software

Iress (Xplan)

AAS

PlatformPlus

MyProsperity

Morningstar

BGL Corp

Fin365

Continue

- 6
- Your unique Data feed credentials will now appear.
 - Please copy your Data feed username and password and immediately enter into your external software provider.
 - Make sure you copy and store the password before leaving this screen. If you don't, you will need to generate a new password.

Step 4 of 4
New Data feed

Select financial planning software

Iress

Credentials

ⓘ Once you close this window, you will not be able to access your unique Data feed password again. Please ensure these details are up to date within your preferred financial planning software.

Data feed username

adviser_0726@ioof.com.au@iress [Copy](#)

Data feed password

KQ[P4xR&Jae: [Copy](#)

Password expiry

10 Sept 2027

Complete

← 6

- 7** You will be required to reset your Direct Data feed password every 12 months. Email reminders will be sent to you prior to expiry.

How to reset your Data feed password*

- The current status of the Data feed will show as either Active, Expiring or Expired. Expiring and Expired Data feeds will require a password update.
- A Data feed will appear as Locked if you enter an incorrect password three times in a row in your external software provider. To unlock a Data feed you will need to change your Data feed password.
- To change your password click on **Change Data feed password**.
- Then follow **steps 4, 5 and 6** from the previous section to update your password.
- If you wish to **remove** a Data feed, click Remove.
- If you want to disable all Data feeds, switch the toggle button off.

*Important

Before resetting your password, make sure no Data feed processes are running (these can often occur during the evening). If a process is still running, your software provider may continue using your old password, which can cause the Data feed to be locked.

Data feed settings

Direct Data feeds

This platform offers Data feeds, allowing for the electronic provision of account data to your selected financial planning software provider such as Xplan. When chosen, all your accounts under your login will be sent to the Data feed recipient. You are required to review and accept the terms and conditions to enable Direct Data feeds.

Direct Data feeds ✓ Enabled ☑

Create a new Data feed
Send your clients data to your financial planning software.

➕ Add new feed

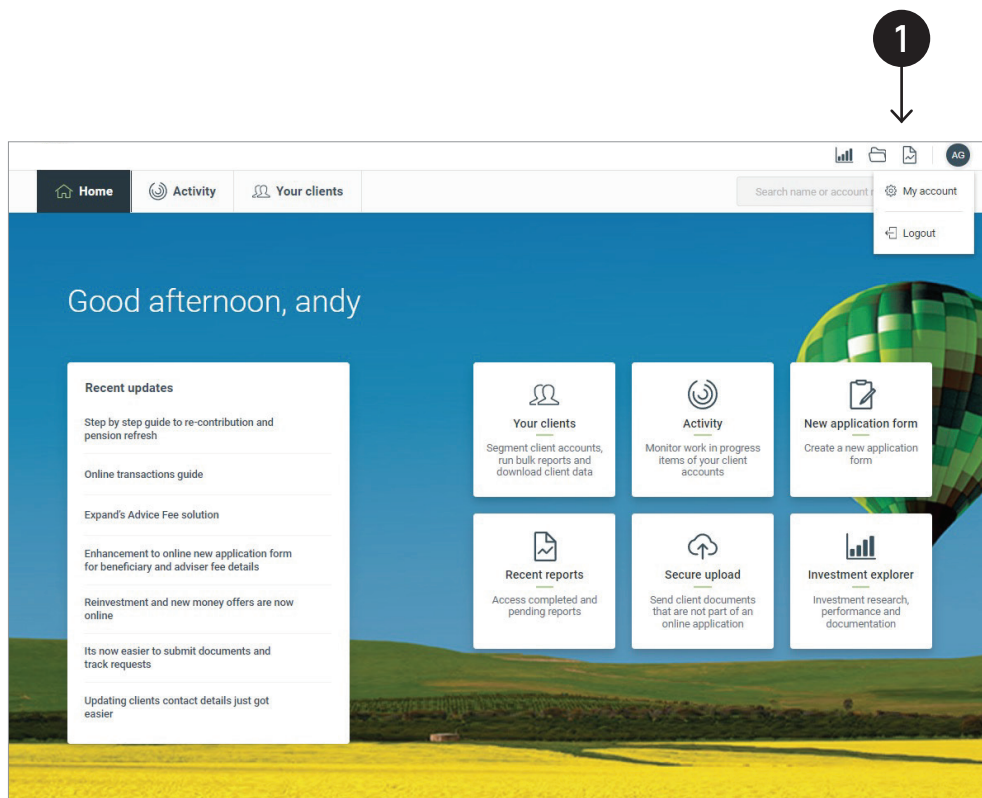
Other Active	✕ Remove	Change Data feed password
adviser_0726@loof.com.au@other Expires: 10 Sept 2027		
Iress Active	✕ Remove	Change Data feed password
adviser_0726@loof.com.au@iress Expires: 10 Sept 2027		

7

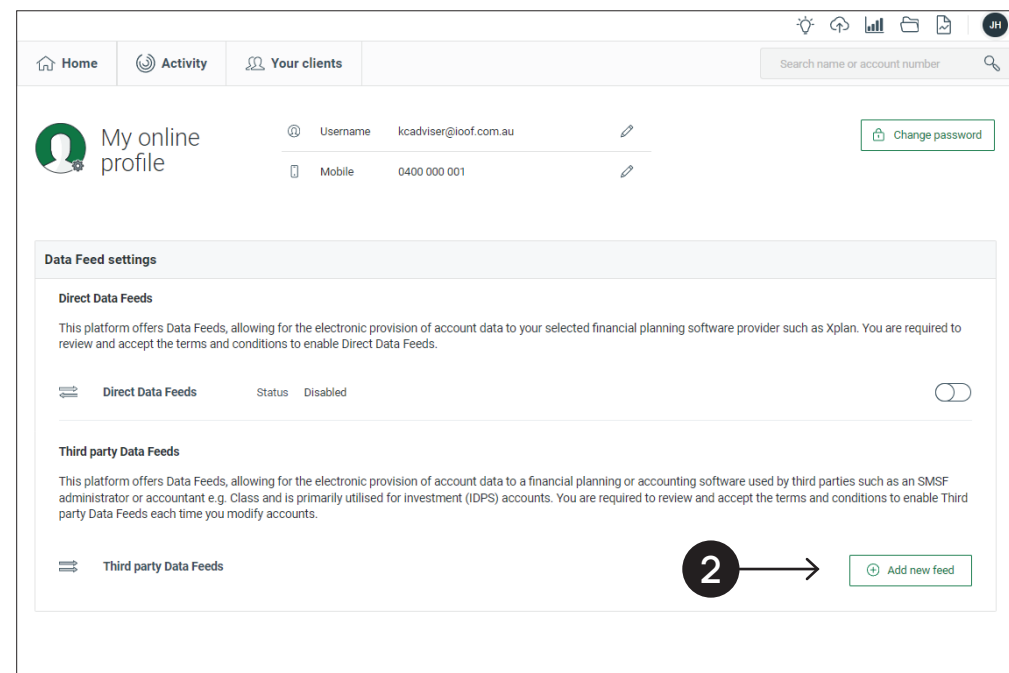
Third party data feeds (Class only)

Add third party data feeds

- 1 On the top right-hand corner, select the icon with your adviser initials to access the **My account** menu.



- 2 Under the Data Feed settings > Third party Data Feeds, click Add new feeds.



Select accounts to enable data feeds

- 1 You can search for accounts to include in the data feed by typing in the account number or name. Once you have located the account select the **plus + sign** symbol. This will then be added to the **Client accounts in feed list**.
- 2 Once you have added your accounts, select **Verify and Save**.
- 3 You will be asked to review and accept the Terms and Conditions. If you accept, input your password to proceed and select **Enable**.

Enabling data feeds with client consent

You must only enable data feeds for clients who have given you their consent to do so.

The image shows three sequential screenshots of the 'New Data Feed' and 'Enable Data Feed' process, with numbered callouts 1, 2, and 3 indicating key steps.

Screenshot 1: New Data Feed

- Callout 1 points to the 'Search by name or account number' input field under 'Select the accounts you want to include'.
- The 'Client accounts in feed' table is empty, showing 'You have no client accounts added'.
- Buttons at the bottom: 'Close' and 'Verify and save'.

Screenshot 2: New Data Feed

- The 'Client accounts in feed' table now contains two entries:

Name	Account No.	
Peter Darryl Gajnik	16484416	⊕
Tamra Isobel Besic	16891671	⊕
- Callout 2 points to the 'Verify and save' button.

Screenshot 3: Enable Data Feed

- Callout 3 points to the 'Enable' button.
- The screen displays terms and conditions, a password input field, and an 'Enable' button.

- 4 You will be directed back the My online profile page where you will be able to confirm the status and number of accounts in the data feed.

Add your data feed to Class

Once you have enabled third party data feeds on Expand Online, you will need to also set up the data feed with Class. For more information please click [here](#) or contact support@class.com.au for support.

The screenshot shows the 'My online profile' page. At the top, there are navigation tabs: Home, Activity, and Your clients. A search bar is on the right. Below the navigation, the profile section shows a user icon, the text 'My online profile', and fields for Username (kcadviser@ioof.com.au) and Mobile (0400 000 001). A 'Change password' button is on the right. The main section is titled 'Data Feed settings'. It has two sub-sections: 'Direct Data Feeds' and 'Third party Data Feeds'. The 'Direct Data Feeds' section has a toggle switch set to 'Disabled'. The 'Third party Data Feeds' section has a toggle switch set to 'Enabled'. Below this, there is a table with one row for 'Class'. The table has columns for 'Status' (Enabled) and 'Accounts' (2). A green box highlights the 'Status' and 'Accounts' columns. Another green box highlights the toggle switch for 'Third party Data Feeds'. An arrow points from a circled '4' below the table to the 'Accounts' column.

Data Feed settings	
Direct Data Feeds This platform offers Data Feeds, allowing for the electronic provision of account data to your selected financial planning software provider such as Xplan. You are required to review and accept the terms and conditions to enable Direct Data Feeds.	
Direct Data Feeds Status Disabled ☐	
Third party Data Feeds This platform offers Data Feeds, allowing for the electronic provision of account data to a financial planning or accounting software used by third parties such as an SMSF administrator or accountant e.g. Class and is primarily utilised for investment (IDPS) accounts. You are required to review and accept the terms and conditions to enable Third party Data Feeds each time you modify accounts.	
Third party Data Feeds ☒ Add new feed	
Class	Status Enabled Accounts: 2 ☒

Edit a third party data feed

1 If you need to edit the data feed, select the **pencil** icon. Here you can add new accounts using the search bar or delete accounts by selecting the cross against the listed account. Once updated, select **Verify and save**.

2 You will be asked to review and accept the Terms and Conditions. If you accept, input your password to proceed and select **Enable**.

Advisers are responsible for the accounts registered

You are responsible for ensuring that clients and their associated accounts are enabled under the third party data feed continue to consent to their information being made available to Class.

The screenshot shows the 'My online profile' page. Under 'Data Feed settings', the 'Third party Data Feeds' section is active. It displays a table with one entry: 'Class' with status 'Enabled' and 'Accounts: 2'. A green box highlights the pencil icon for editing this feed.

The 'New Data Feed' modal is shown. It includes a search bar for accounts and a table of client accounts. The account 'Peter Darryl Gajnik' with account number '16484416' is selected, indicated by a green box around the cross icon.

1

Delete and disable data feed

- 1 You can also delete or disable the data feeds.
- 2 To disable the feed, select the toggle with the tick ✓ icon. You will be directed to confirm your selection. Input your password to proceed and select **Disable**.
- 3 To delete the data feed, select the bin icon. You will be directed to confirm your selection. Input your password to proceed and select **Delete**.

Disabling or deleting a third party data feed

If you disable a data feed, we will cease sending any account data. You can re-enable the data feed at any time and your previous client list will be retained.

If you delete the data feed, we will cease sending any account data and **all accounts will be removed** and will need to be readded.

The screenshot shows the 'My online profile' page. Under 'Data Feed settings', there are two sections: 'Direct Data Feeds' and 'Third party Data Feeds'. The 'Direct Data Feeds' section has a toggle switch set to 'Disabled'. The 'Third party Data Feeds' section has a table with one entry. A red circle with the number '1' points to the 'bin' icon in the actions column of the table.

The screenshot shows the 'Disable Data Feed' confirmation dialog. It asks 'Are you sure you want to disable this feature? IOOF will cease sending all client data via Data Feeds once this action is complete.' and 'Please enter your password to proceed'. A red circle with the number '2' points to the 'Disable' button.

The screenshot shows the 'Delete Data Feed' confirmation dialog. It asks 'Are you sure you want to delete the Feed for this provider? IOOF will remove all accounts and cease sending client data via Data Feeds once this action is complete.' and 'Please enter your password to proceed'. A red circle with the number '3' points to the 'Delete' button.

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