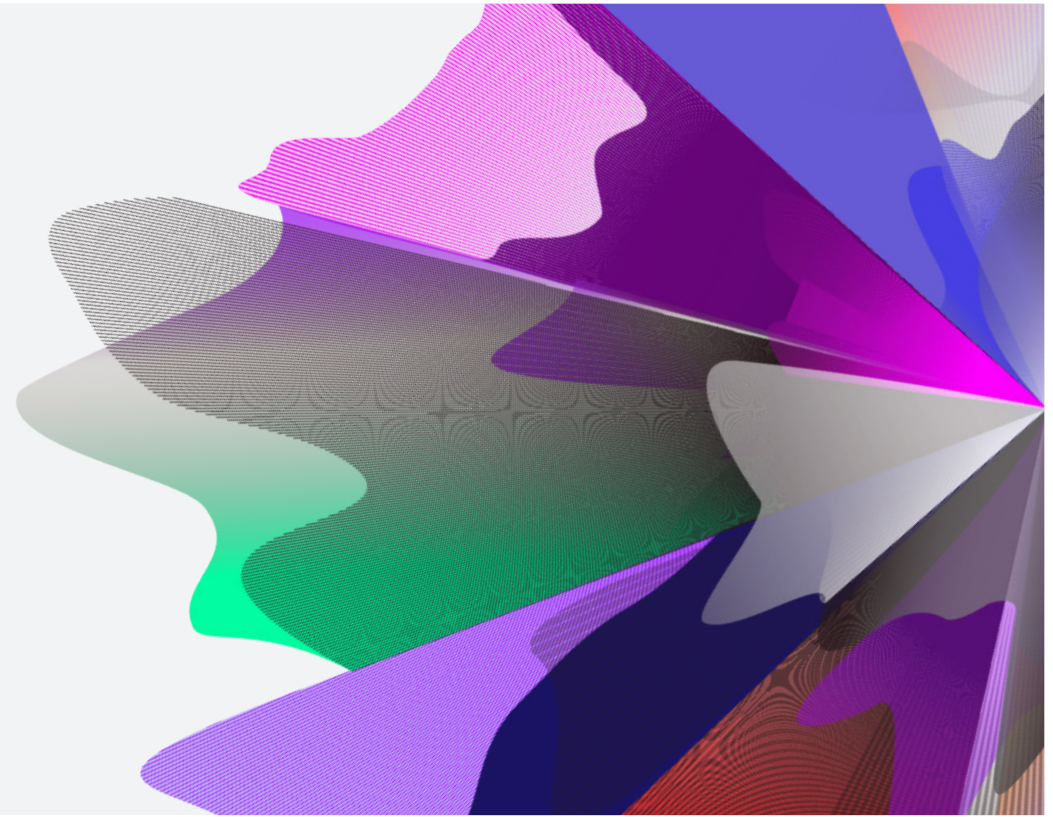


EXPAND

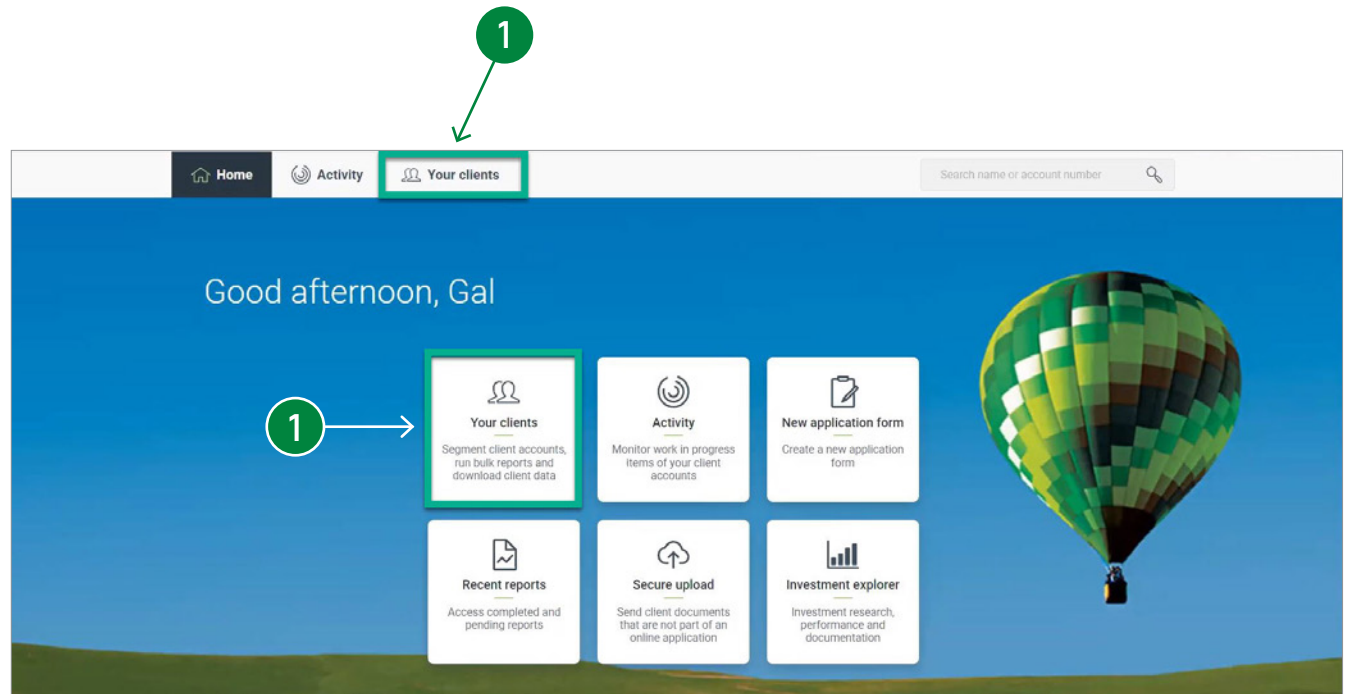


Expand Functionality – Move money: Contributions, consolidation and deposits

June 2025
myexpand.com.au

- 1 To make a contribution/deposit 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.



Superannuation accounts

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

3 In the **Contributions and consolidation** section, it details the ways to make a contribution. The three most convenient options to make a contribution is via:

- a **BPAY: Biller code** details and **reference numbers** per contribution type are available to make a contribution
- b **EFT: BSB and Account number** per contribution type are available to make a contribution.
- c **One-off direct debit:** Refer to step 4 further details.

The screenshot shows the KDF Superannuation account interface. At the top, there's a navigation bar with 'Home', 'Activity', and 'Your clients'. A search bar is on the right. Below this, the account name 'Expand Extra Super' is displayed. The 'Account performance (net)' is 35.78% and the 'Current balance' is \$495,574.53. A green circle with the number '2' points to the 'Move money' tab in the navigation bar.

Below the navigation bar, there's a message: 'Online withdrawals are not available for this account. For information about online withdrawal eligibility please consult the [online withdrawals user guide](#) or contact us.' A 'Make a withdrawal' button is on the right.

The main section is titled 'Withdrawals and contributions'. It has two sub-sections: 'Available cash' and 'Nominated bank account'.

Available cash: \$11,798.70. Below this, it says 'Pending estimated investment value: \$2,161.85'. A link 'Go to standing instructions' is at the bottom.

Nominated bank account: A message states: 'Prior to undertaking an online withdrawal your client must nominate a bank account by completing the Nomination of Financial Institution form.' A link 'Download Nomination of Financial Institution form' is at the bottom.

The 'Contributions and consolidation' section is highlighted with a green box. It contains three main areas:

- Make a contribution:** Features the BPAY logo and a 'Biller code' of 364455.
- BPAY® Contribution information:** A table showing contribution types and reference numbers.

Contribution type	Contributor	Reference number
Personal	You	167043166
Spouse	Your spouse	967043166
- Electronic Funds Transfer (EFT):** A table showing account names, contribution types, BSB, and account numbers.

Account name	Contribution type	BSB	Account number
Lucas Mitchell Boini	Personal	066-740	116704316
	Spouse	066-740	916704316
- Contribution forms:** A list of links for downloading forms: 'Request transfer from another fund', 'Make an additional lump sum contribution', 'Direct debit request', and 'Choice of fund for employer contributions'.

A green circle with the number '3' points to the 'Contributions and consolidation' section. A 'Set up a one-off direct debit' button is located at the bottom right of the 'Contributions and consolidation' section.

Superannuation accounts

4 To set up a one-off direct debit:

4.a Select the link **Set up a one-off direct debit**.

Straight through processing (STP) is available for personal contributions only. For the contribution to be eligible for STP the surname of the bank account name must match the surname of the member.

4.b Enter the details to submit a direct debit which includes:

- i) Deposit type: Personal and Spouse
- ii) Bank Account Name
- iii) BSB
- iv) Account number
- v) Preferred date (for the deposit amount to be deducted)*
- vi) Deposit amount**

* Preferred date is indicative and may not occur on this date.

** This amount will be requested as a single transaction, a rejected transaction will result in delays.


4.c Review the **adviser declaration** and select the checkbox to download and submit the request.

4.d Select the **Download and submit** button, the system will generate the online instruction form to be download, signed by the client and stored.

4.e To submit the request, enter your password and select the **confirm** button. Confirmation of your direct debit request submitted will display and a banner on the move money page will confirm the submitted request.

If you would like to save the one-off direct debit entered, select the **x** button on the **Confirm your password** message which will take you back to the one-off direct debit details. Then select the **x** button of the side panel to save the request for later.

Contributions and consolidation

Make a contribution		BPAY® Contribution information		Electronic Funds Transfer (EFT)			Contribution forms	
 Biller code 364455	Contribution type	Contributor	Reference number	Contribution type	BSB	Account number	Request transfer from another fund Make an additional lump sum contribution Direct debit request Choice of fund for employer contributions	
	Personal	You	168438340	Personal	066-740	116843834		
	Spouse	Your spouse	968438340	Spouse	066-740	916843834		

[Set up a one-off direct debit](#)

Set up a one-off direct debit

One-off direct debit

Deposit type
Personal contribution

If you want to claim a tax deduction for your personal contribution, please complete a Tax Deduction Notice Form which can be obtained from the ATO website.

**Direct debit one-off cannot be sent to your client via DocuSign.*

Account name
Mr Sam Sample

BSB
083-001

Account number
123456789

Preferred date
05 / 06 / 2025

Deposit amount
\$ 10,000.00

Adviser declaration

☒ As a financial adviser, I declare that:

- The information completed in this form is true and correct.
- My client has provided their confirmation to proceed with this one-off direct debit instruction.
- I will retain a copy of the signed confirmation and provide the original to the Trustee/Service Operator upon request.
- I am authorised to instruct the Trustee/Service operator to direct debit the funds from the financial institution nominated in this form and my client has authorised me to request direct debit details from their financial institution.
- I have informed my client that when the direct debit request to their financial institution has been processed, the funds will be invested as per their standing investment instructions the next business day.
- The Trustee/Service operator and any member of the Insignia Financial Group will not be held liable for any losses which may occur due to any market movements should the direct debit request be dishonoured or rejected by my client's nominated financial institution.
- I release and indemnify the Trustee/Service Operator and any member of the Insignia Financial Group from and against all demands, actions, proceedings, losses, liabilities, and costs arising directly or indirectly out of or in connection with any direct debit instructions provided under this authority.

Download and Submit

Confirm your password

Please confirm your password for security purposes to continue with the submission of this request.

Show ☐ Confirm

Downloads

direct-debit (13).pdf

[Open file](#)

[See more](#)

Superannuation accounts

5 The other options available can be made by selecting the appropriate link under 'Contribution forms' to download and complete the paper forms to be sent back to us to process. 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**.

Shown here are examples of contribution forms.

The image displays four examples of contribution forms, each with a green arrow pointing to it from a letter in a green circle:

- a Request to Transfer**: A form for transferring monies from another superannuation fund or income stream into Expand Essential Super or Expand Extra Super.
- b Additional Lump Sum Contribution - Super**: A form for making a lump sum contribution, including sections for personal details, contribution information, and account details.
- c Direct Debit Request**: A form for making a one-off direct debit, set up or change an ongoing direct debit and cancel any existing direct debits.
- d Choice of fund**: A form for nominating the Expand Essential Super or Expand Extra Super to become the chosen fund.

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

The image is a screenshot of the Expand website interface. At the top, there is a navigation bar with links for 'Activity', 'Advanced Search', and a search bar. Below this is a dark blue bar with links for 'Corporate actions', 'Maturing investments', 'Investment orders', 'Advice fees', 'Online forms', and 'Business reporting'. The main content area shows a 'Request type' dropdown menu with 'Please select one...' and a 'Account details' section. A green arrow points from the 'Secure document uploader' text to the 'Request type' dropdown.

Investment accounts

- 6 Search and select the investment account to make a deposit (Refer to step 1). From the **Summary** tab, navigate to the **Move Money** tab.
- 7 On the **Move Money** tab In the Make a Deposit section, there are three ways to make a deposit:
 - a **BPAY**: **Biller code** details and **reference numbers** per contribution type are available to make a deposit.
 - b **EFT**: **BSB** and **Account number** per contribution type are available to make a deposit.
 - c **One-off direct debit**: Refer to step 8 further details.

The screenshot shows the 'Move Money' tab of an investment account. The top navigation bar includes 'Home', 'Activity', 'Your clients', and a search bar. The account performance is 31.02% and the current balance is \$196,000.54. The 'Move money' tab is selected, showing 'Withdrawals and deposits'.

Available cash: \$-547.73. A pending estimated investment value of \$77.94 is shown. A note states: 'Not enough cash? If there is not enough cash available to withdraw, you can choose which assets to sell on the [investments page](#).'

Nominated bank account: Giuliano Lasco, BSB 037-178, Account number ****9104, Bank name Westpac Banking Corporation. A link to 'Download Nomination of Financial Institution form' is provided.

Make a Deposit section:

- BPAY:** Biller code 83972, Reference number 170429501.
- Electronic Funds Transfer (EFT):** Account name Ronald Milan Baby, BSB 066-741, Account number 117042950.
- Set up a one-off direct debit** button (highlighted with a green box and arrow from step 7).

Investment accounts (cont.)

8 To set up a one-off direct debit:

8a Select the link **Set up a one-off direct debit**.

8b Enter the details to submit a direct debit which includes:

- i) Deposit type: Personal and Spouse
- ii) Bank Account Name
- iii) BSB
- iv) Account number
- v) Preferred date (for the deposit amount to be deducted)*
- vi) Deposit amount**

* Preferred date is indicative and may not occur on this date.

** This amount will be requested as a single transaction, a rejected transaction will result in delays.

8c Review the **adviser declaration** and select the **checkbox** to download and submit the request.

8d Select the **Download and submit** button, the system will generate the online instruction form to be download, signed by the client and stored.

8e To submit the request, *enter your password* and select the **confirm** button. Confirmation of your direct debit request submitted will display and a banner on the move money page will confirm the submitted request.

If you would like to save the one-off direct debit entered, select the **x** button on the **Confirm your password** message which will take you back to the one-off direct debit details. Then select the **x** button of the side panel to save the request for later.

Set up a one-off direct debit

One-off direct debit

Account name
Mr S Sample

BSB
083-001

Account number
123456789

Preferred date
05 / 06 / 2025

Deposit amount
\$ 10,000.00

Adviser declaration

☒ As a financial adviser, I declare that:

- The information completed in this form is true and correct.
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- I will retain a copy of the signed confirmation and provide the original to the Trustee/Service Operator upon request.
- I am authorized to instruct the Trustee/Service operator to direct debit the funds from the financial institution nominated in this form and my client has authorised me to request direct debit details from their financial institution.
- I have informed my client that when the direct debit request to their financial institution has been processed, the funds will be invested as per their standing investment instructions the next business day.
- The Trustee/Service operator and any member of the Insignia Financial Group will not be held liable for any losses which may occur due to any market movements should the direct debit request be dishonoured or rejected by my client's nominated financial institution.
- I release and indemnify the Trustee/Service Operator and any member of the Insignia Financial Group from and against all demands, actions, proceedings, losses, liabilities, and costs arising directly or indirectly out of or in connection with any direct debit instructions provided under this authority.

Download and Submit

Confirm your password

Please confirm your password for security purposes to continue with the submission of this request.

Show

Confirm

Contact us

Postal address

Expand
GPO Box 264
Melbourne VIC 3001

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1800 517 124

Email

clientfirst@myexpand.com.au
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EXPAND

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