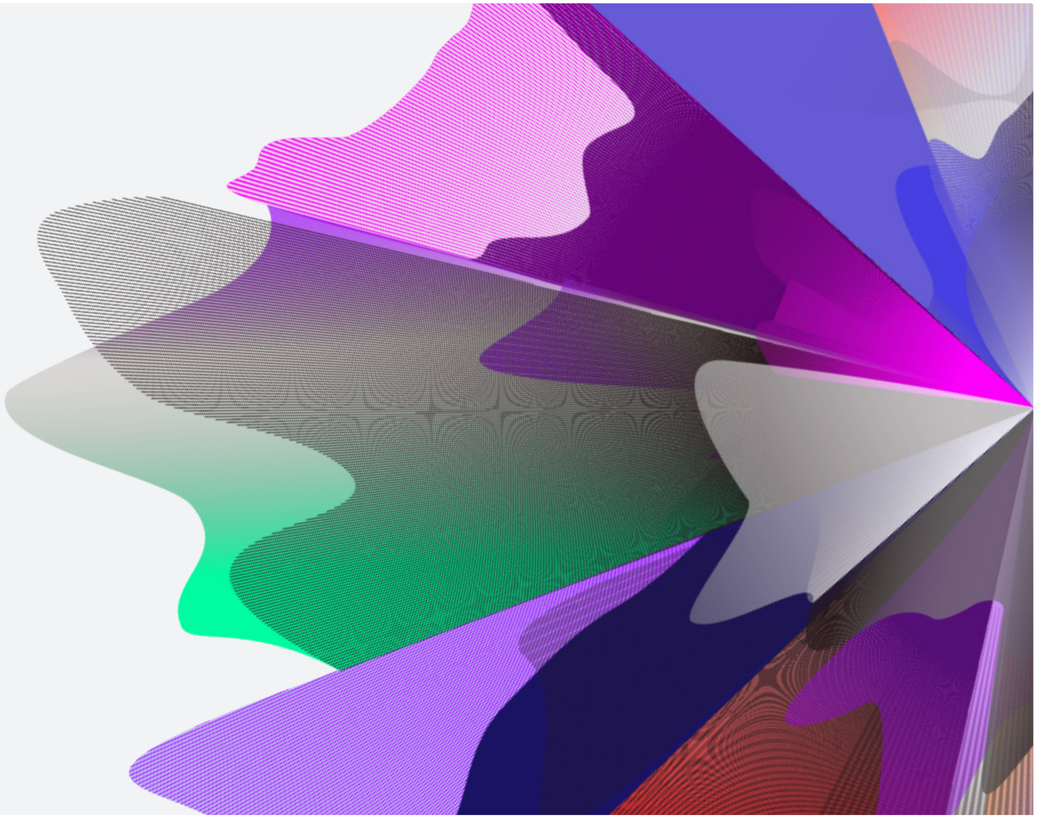


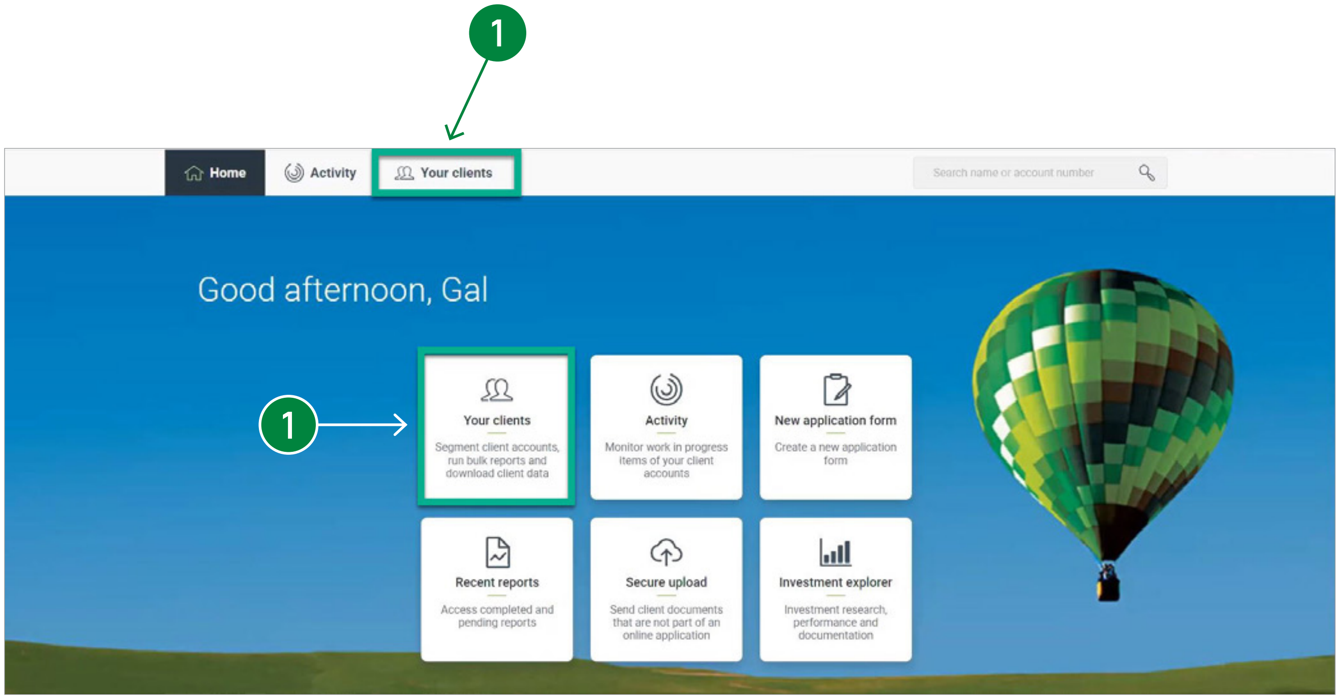
Expand Functionality – Move Money: Withdrawals

September 2023
myexpand.com.au

Move Money: Withdrawals

1 To make a withdrawal on 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.



Move Money: Withdrawals (cont.)

2 From the Move money page, click on the ***Make a withdrawal*** button.

3 A Withdrawal details side panel will display to enter the withdrawal amount and type – net or gross. Once the checkbox for terms and conditions is selected, click on the ***Submit*** button to complete the request.

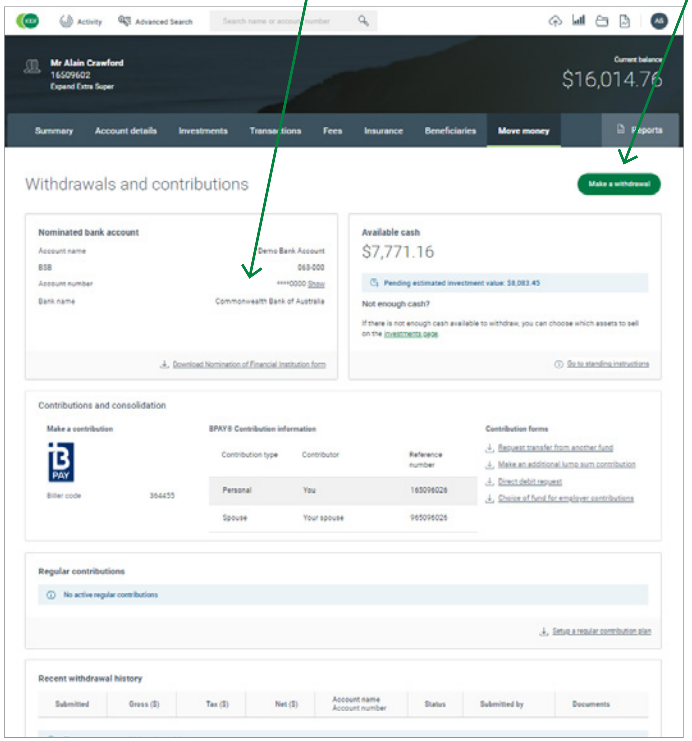
4 To finalise the withdrawal, enter your password and select ***Confirm*** to submit the request.

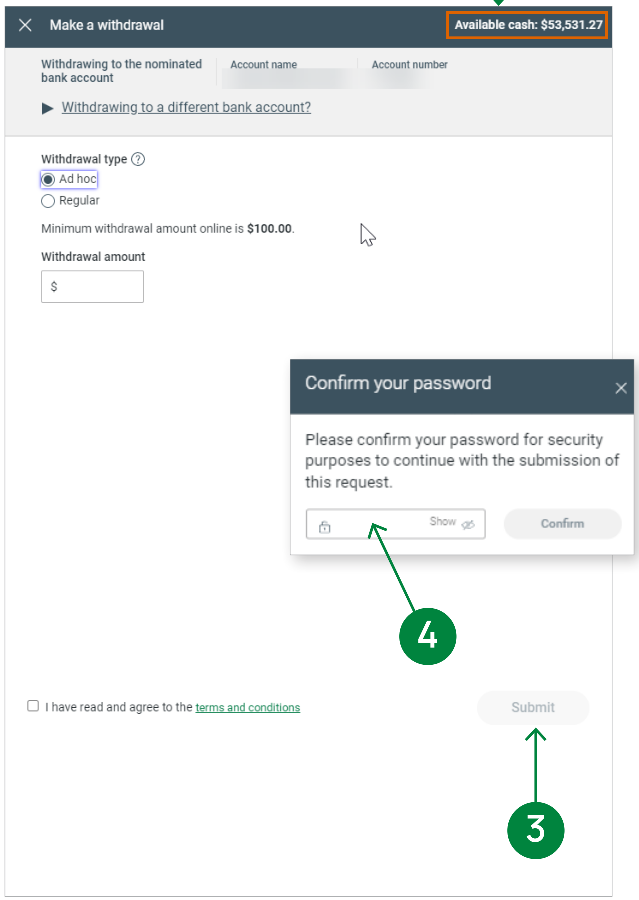
IMPORTANT:

- Only partial withdrawals are available to complete online.
- Adviser transaction authority must be enabled and a bank account must be on file for Super, Pension and Investments.
- For Super accounts, the client needs to meet a condition of release to make a withdrawal.
- For Investment accounts, regular withdrawals can be set up online.
- Minimum withdrawal amount is $100.
- Withdrawals submitted before 2pm AEST that are less than 70% of the accounts liquid assets will be transferred on the same day and are generally available in the nominated bank account the following morning.
- Withdrawals that exceed 70% of the accounts liquid assets will be transferred once the proceeds of investment sells have been received. This may take up to 10 business days.

HINT: To complete a withdrawal online, a nominated bank account needs to be listed. The Nomination of Financial Institution form needs to be completed.

HINT: If there is insufficient funds, you can sell via the investment page or choose to use the sell down instructions when processing the withdrawal.





Move Money: Withdrawals (cont.)

5 Once the withdrawal is submitted, the system will provide a confirmation.

6 The withdrawal confirmation can be generated by selecting the PDF link for the documents.

7 Details of the submitted withdrawal will be available in the ***Recent Withdrawal History*** section further down the Move Money page. It will also show in the ***Activity Monitor – Investment Orders*** tab.

HINT: If a nominated bank account needs to be applied to the account, ***download*** and complete the ***Nomination of Financial Institution*** form. The signed forms can be uploaded via the ***Secure Document Uploader***.

For full withdrawals/account closures, we require a withdrawal form signed by the client which can be uploaded using the Secure Document Uploader.

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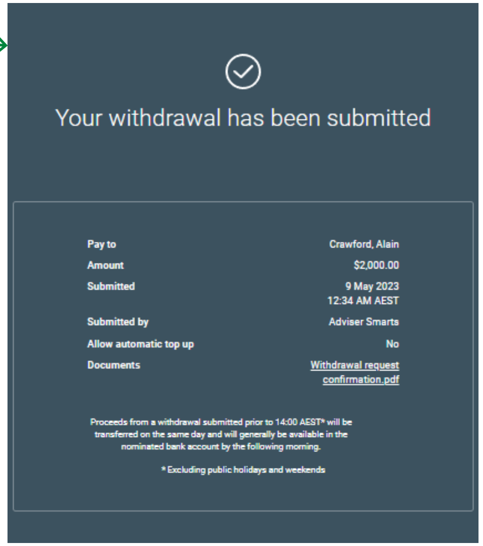

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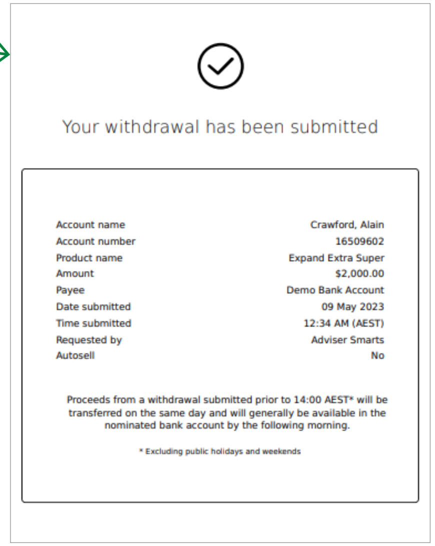

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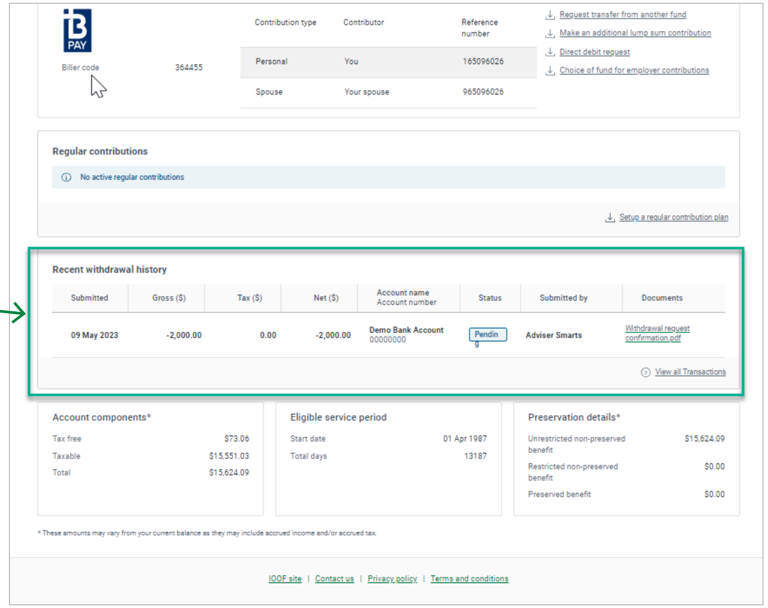

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