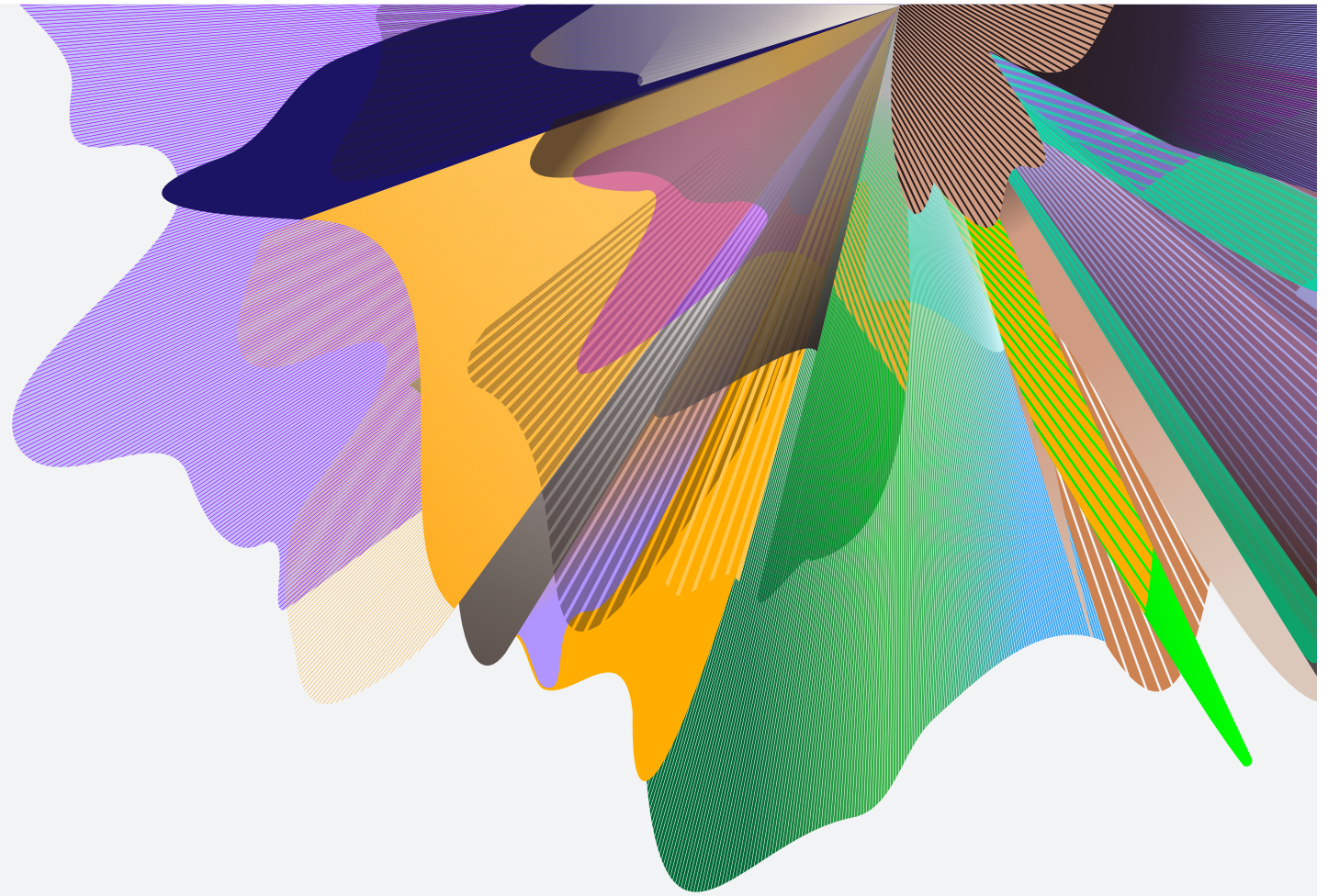




EXPAND

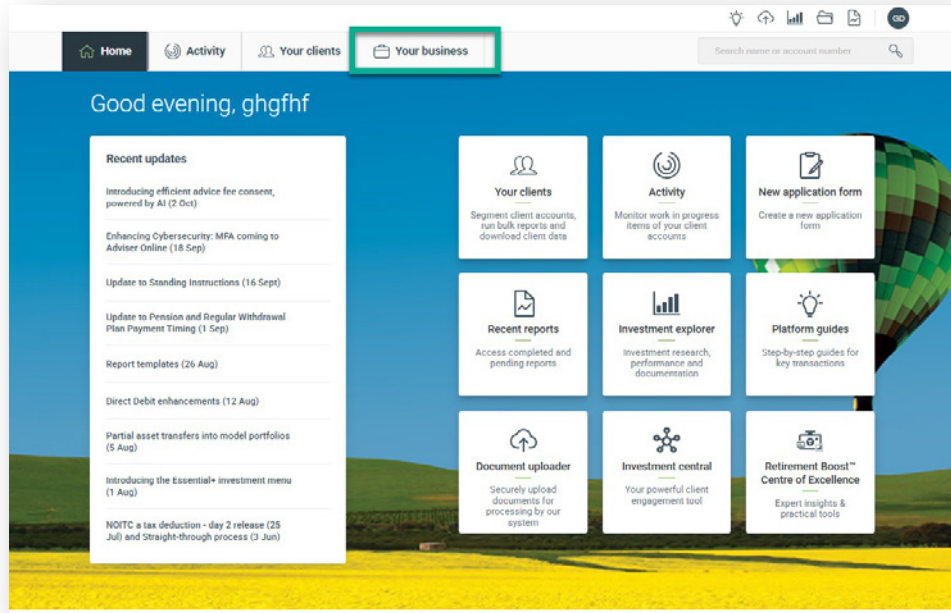


Adviser Dashboard – Your Business User Guide

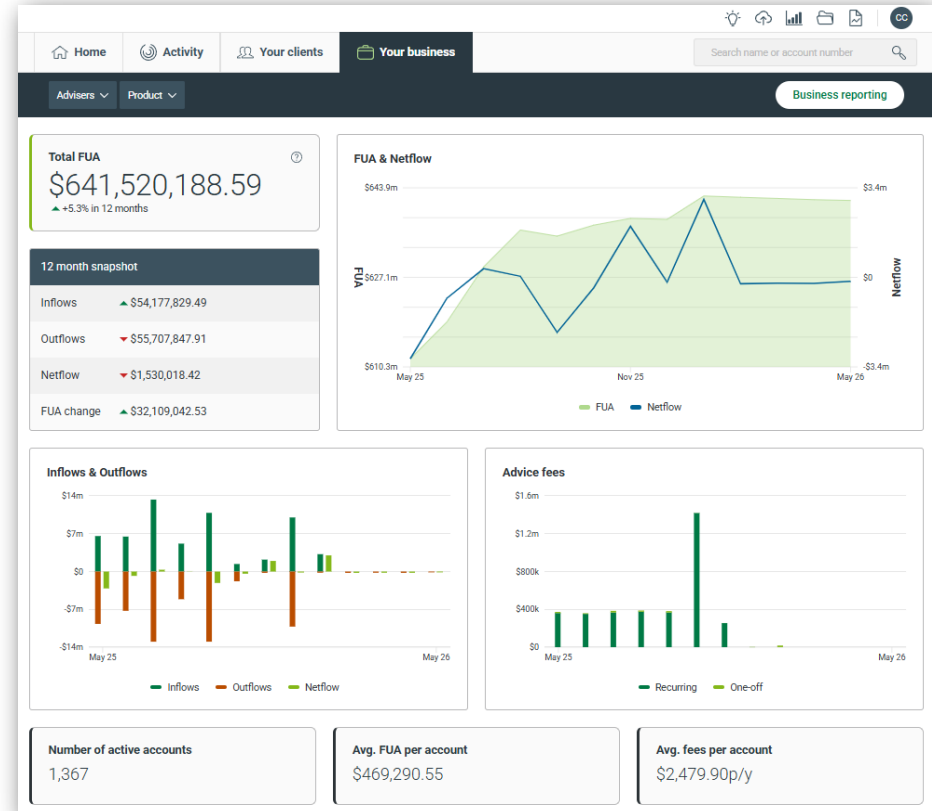
June 2026
FOR ADVISER USE ONLY

Where to find the adviser dashboard

1 Go to the adviser website homepage



2 Navigate to 'Your business' – available as a new tab next to 'Your clients'



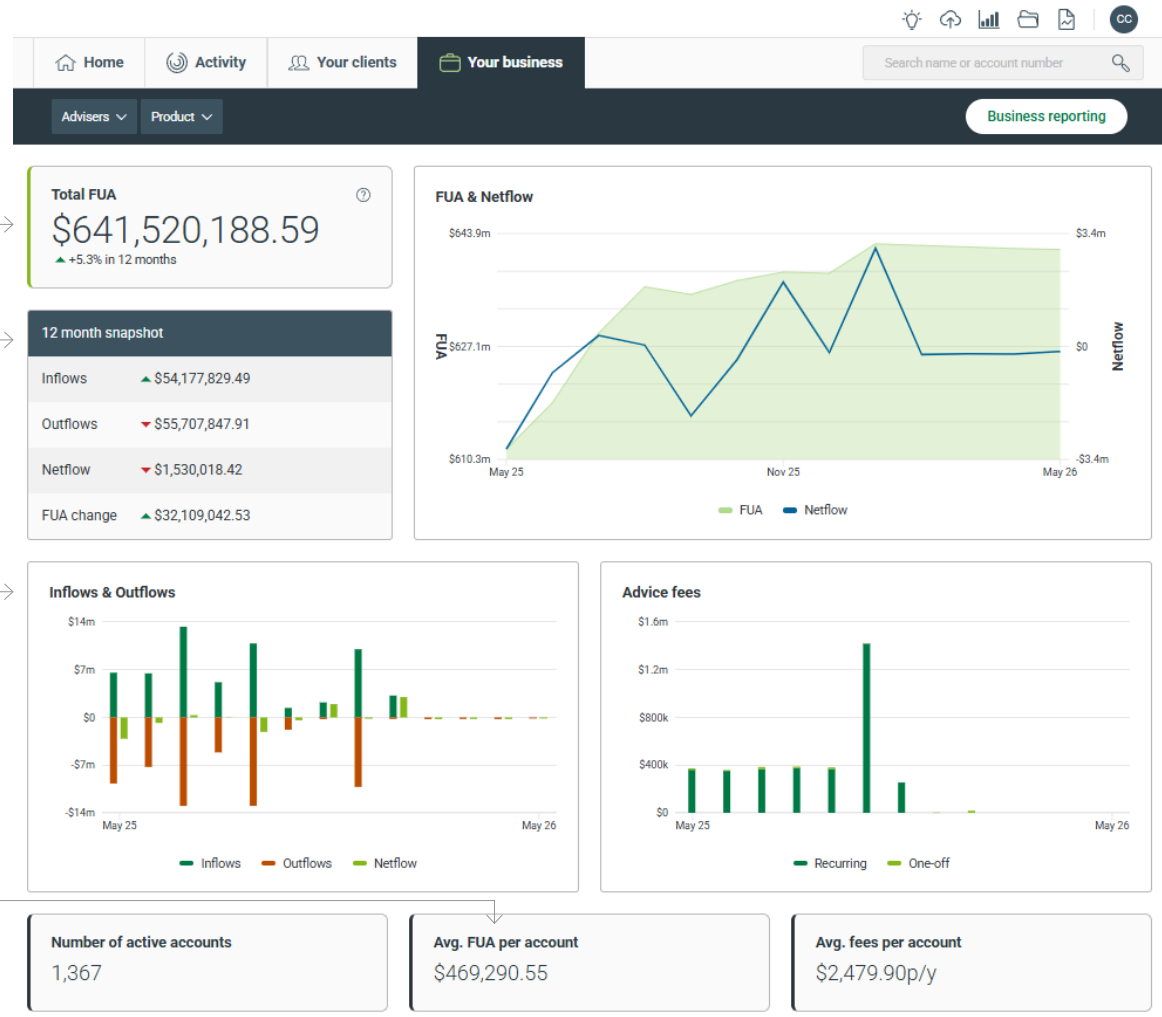
Your business dashboard

This section displays the 'total Funds Under Administration (FUA)' for all accounts within your portfolio, across all advisers associated with your login. It also shows the percentage change in Total FUA over the past 12 months, up to the current date.

The '12-month snapshot' section shows the total over the past year as well as the overall change in FUA in dollar terms.

This graph provides a visual representation of monthly 'inflows and outflows' over the past 12 months. You can hover over each bar to view the corresponding flow values for a specific month.

The number of active accounts and 'Avg. FUA per account' displays information about your active accounts as at today. The dashboard also takes into account any residual transactions.

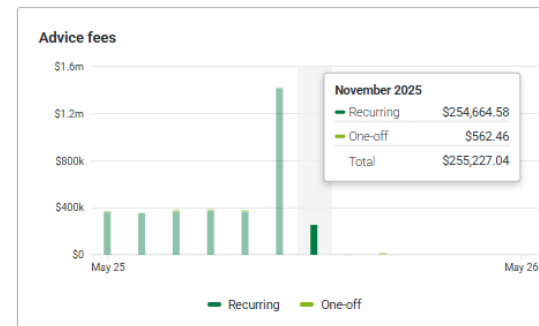
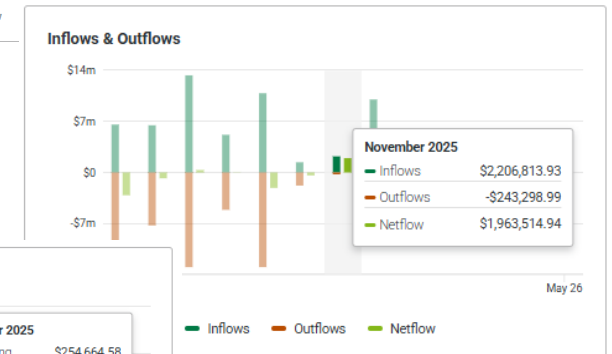
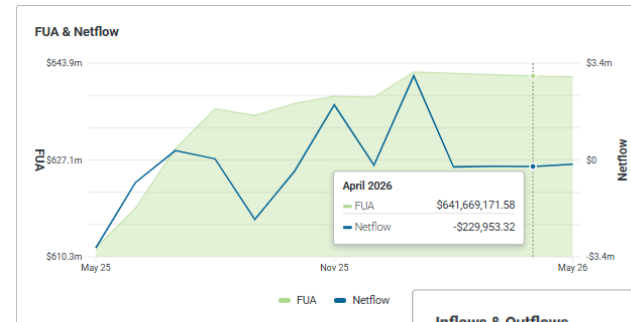
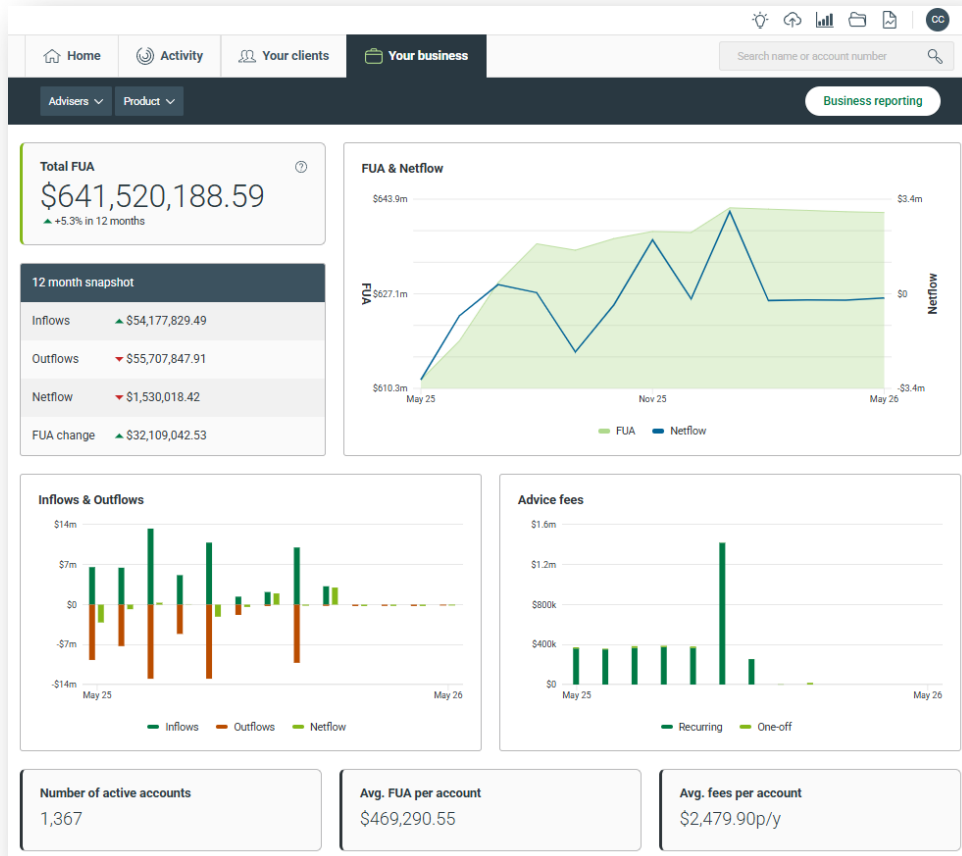


The 'Business reporting' feature is now available on the 'Your business' page and remains accessible under the 'Activity' tab. There are no changes to its functionality.

This graph helps you understand your business performance by comparing FUA and net flows over the past 12 months. Hover over each point to see the FUA at the end of the month and the net flow for that month.

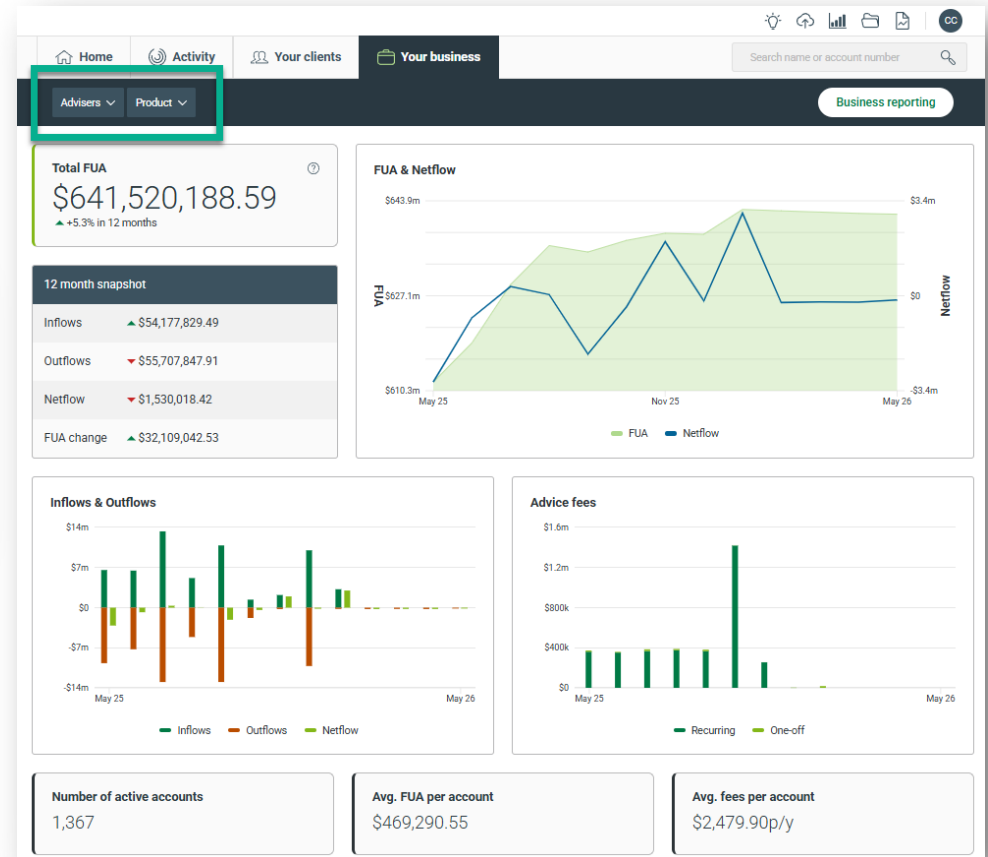
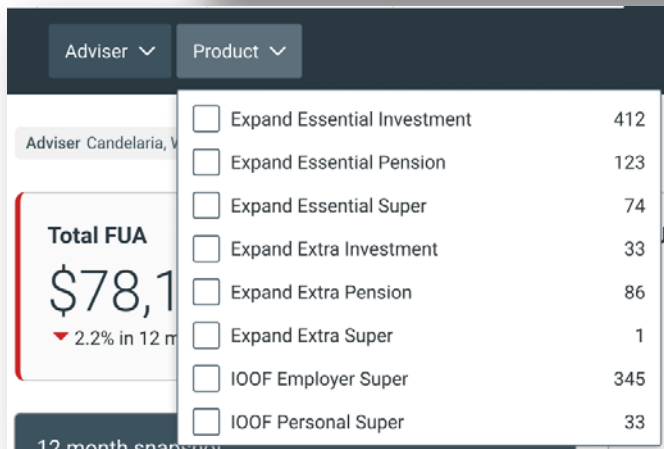
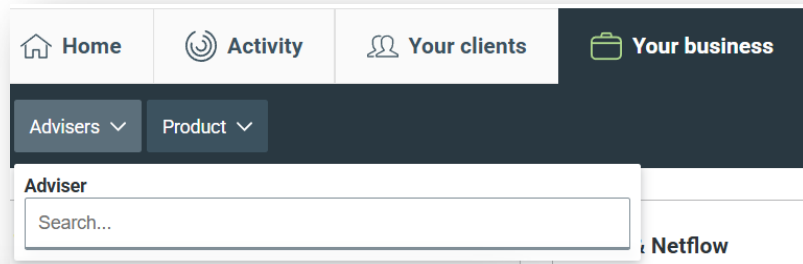
The 'Advice fees' graph provides a monthly view of ongoing (recurring) fees and one-off fees charged over the past 12 months, helping you understand your fee activity over time. The 'Avg. fees per account' displays information about your accounts, including active, pending closure, and closed accounts for the past year.

Your business dashboard – hover examples



Your business dashboard – filters

You have the ability to filter the information on this dashboard via per adviser and per product.



Contact us

Postal address

MLC Expand
GPO Box 264
Melbourne VIC 3001

Telephone

1800 517 124

Email

clientfirst@myexpand.com.au
advisoryrelationships@insigniafinancial.com.au

Website

myexpand.com.au

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