



How to make a contribution

Help Guide

1. Search for your client using *Client Search* bar and select the gold down arrow (v) next to the relevant account.
2. Navigate to 'Make a Contribution or request a rollover from another fund' in the *Transact* column.

Adam Jones

View	Manage	Transact
Account summary	Mailing address	Switch investments
Account valuation	Investment instructions	One-off portfolio rebalance
Account balance	Regular savings plan	Make a Contribution or request rollover from another fund
Transactions	Nominated beneficiaries	Tax deduction for personal contributions
Performance	Adviser remuneration	Account transfer
Asset allocation		Withdrawal request
Benefit details		
Investment gain/loss		
Fee Summary		

Adding a new rollover

The Acclaim portal enables rollovers to be initiated and actioned online using the below process.

1. Enter the eleven-digit ABN for the Superannuation Fund you wish to rollover from. The system will attempt to match this ABN to a complying superannuation fund. If one is not found, you will be asked to enter the details manually. Please ensure the member or account number for the From fund is also entered and accurate.

Deposit Details

Rollovers

Rollover 1

Delete

Enter Super Fund Details

Australian Business Number (ABN)

Note: ABN must be eleven digits

Enter Super Fund Details

Australian Business Number (ABN)

00300993205

No rollover institutions found for this ABN. Please enter details manually.

Fund Name

Unique Superannuation Identifier (USI)

Member Or Account Number



- Select 'Full transfer' or 'Partial transfer'. For a partial transfer, please enter an 'Estimated Rollover Amount'.

Amount To Be Transferred

Rollover Amount

Full transfer
 Partial transfer

Estimated Rollover Amount

\$ 0.00

Clear Details

- Click [Next] and download the pre-submission documents.
- The *Transfer Authority Request* form will need to be signed by the member and uploaded in the pre-submission screen via the [Browse] and [Upload] buttons.
- Tick the boxes to confirm all completed forms have been signed by the client.
- Click to [Submit] the transaction and the system will action the rollover instantly.

Make A Contribution Or Request Rollover From Another Fund

1 Contribution / Deposit Details 2 Pre-Submit Documentation

Pre-Submission Documentation

You will need to take the following actions to submit this application:

Action required	Tick to confirm
Investment deposit advice ← I confirm the client has requested the transaction	<input type="checkbox"/>
Transfer authority request ← I confirm that the client has requested the rollovers.	<input type="checkbox"/>
I confirm all completed application forms has been signed by the client and have been uploaded below	<input type="checkbox"/>

Upload Transfer Authority Request Form/S

Select the file/s with your client's signed Transfer Authority request form.

Click browse to locate your file and then upload.

Browse Upload

Things you need to know

- You can track progress of this activity post submission in AMG Online > Activities Management.
- You will not be able to remove an uploaded document once Submit has been selected. If you require assistance to remove a document post submission, please contact the AMG Client Service Team on 1300 264 264.



Making a personal or spouse contribution

1. Select 'Personal' or 'Spouse' in the dropdown menu.
2. Enter amount of contribution.
Please note: direct debit is not available for once off contributions, or contributions made outside of original account set up.
3. Select the desired payment method.
4. Click [Next]

Contributions

Contribution 1

Contribution Type

Personal \$100,000.00

Total Contribution Amount \$ 100,000.00

Payment Method

EFT

BPAY®

Cheque

Note: a BPay limit of \$25,000 per transaction applies.

Add Contribution

Deposit Summary

Rollover Total

Contribution Total \$100,000.00

Cancel Edit Save To Resume Submit **Next**

5. Click on 'Investment deposit advice'. This document will advise on how to make the payment via BPay, EFT or cheque. This can be supplied directly to your client. Please ensure that only the reference details included on this document are used for the EFT transfer. This will ensure the contribution is allocated to the member account as soon as funds are received.
6. Tick the box to confirm and when you're ready, select [Submit].

Home Clients Client search Mr Adam Jones AMG Acclaim Super A0020076 Make a Contribution or request rollover from another fund

Adam Jones
AMG Acclaim Super - A0020076

Make A Contribution Or Request Rollover From Another Fund

1 Contribution / Deposit Details 2 Pre-Submit Documentation

Pre-Submission Documentation

You will need to take the following actions to submit this application:

Action required	Tick to confirm
Investment deposit advice	<input checked="" type="checkbox"/>
I confirm the client has requested the transaction	<input type="checkbox"/>

Things you need to know

- Retain a copy of any signed documentation for your records
- If direct debit has been selected the payment will be deducted from the nominated bank account immediately
- If direct debit has been selected the payment will be deducted from the nominated bank account immediately

Back Cancel Edit Save To Resume Submit

Assuming the reference details can be matched correctly the contribution will be visible on the member account 24 hours after funds are received.

