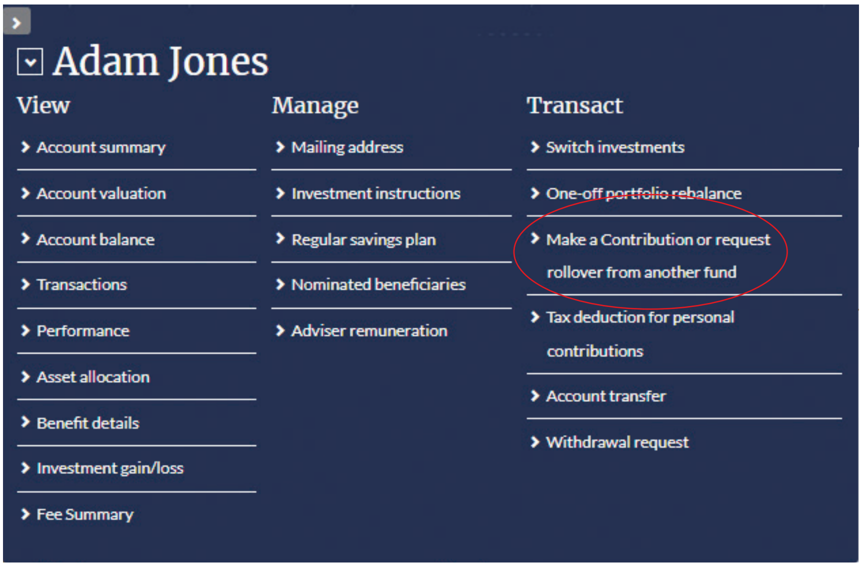
How to make a contribution

Help Guide

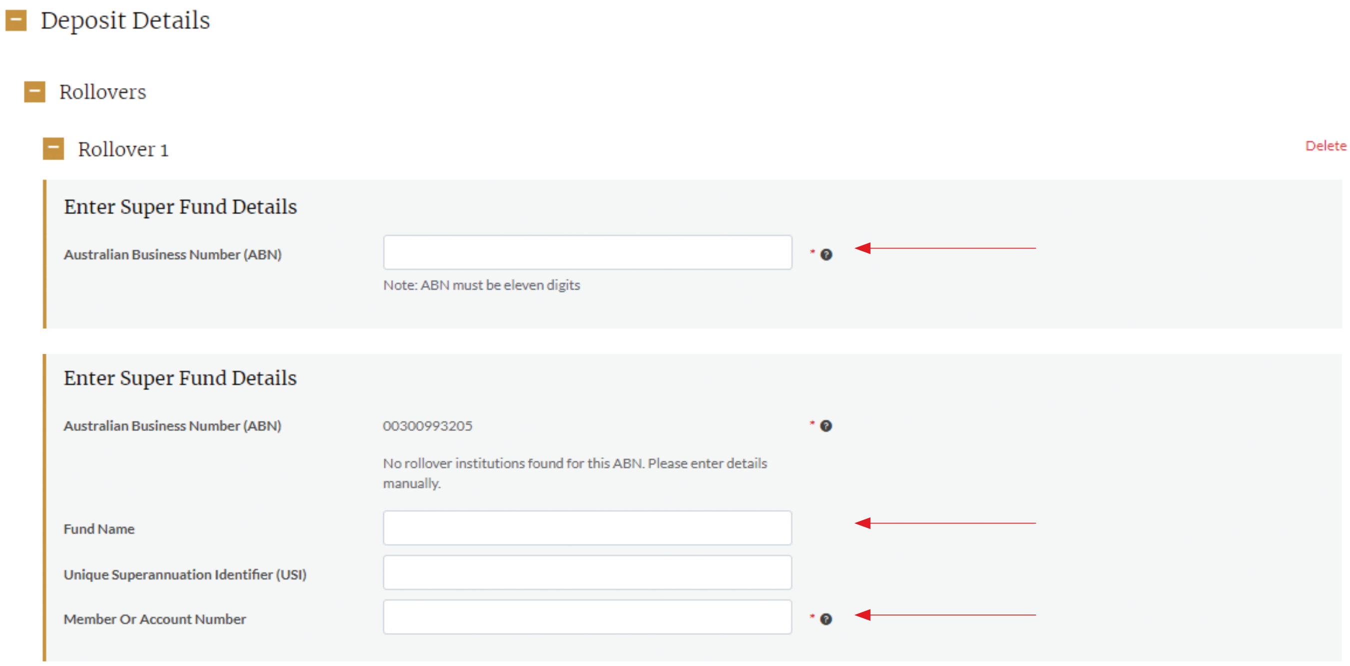
1. Search for your client using *Client Search* bar and select the gold down arrow (⌄) next to the relevant account.
2. Navigate to 'Make a Contribution or request a rollover from another fund' in the *Transact* column.



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.



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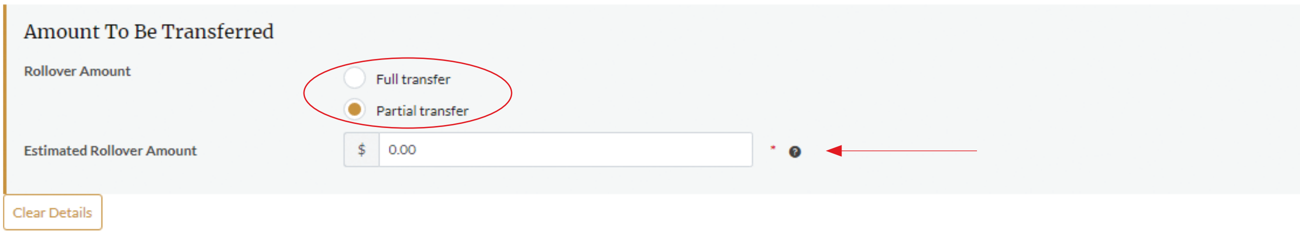
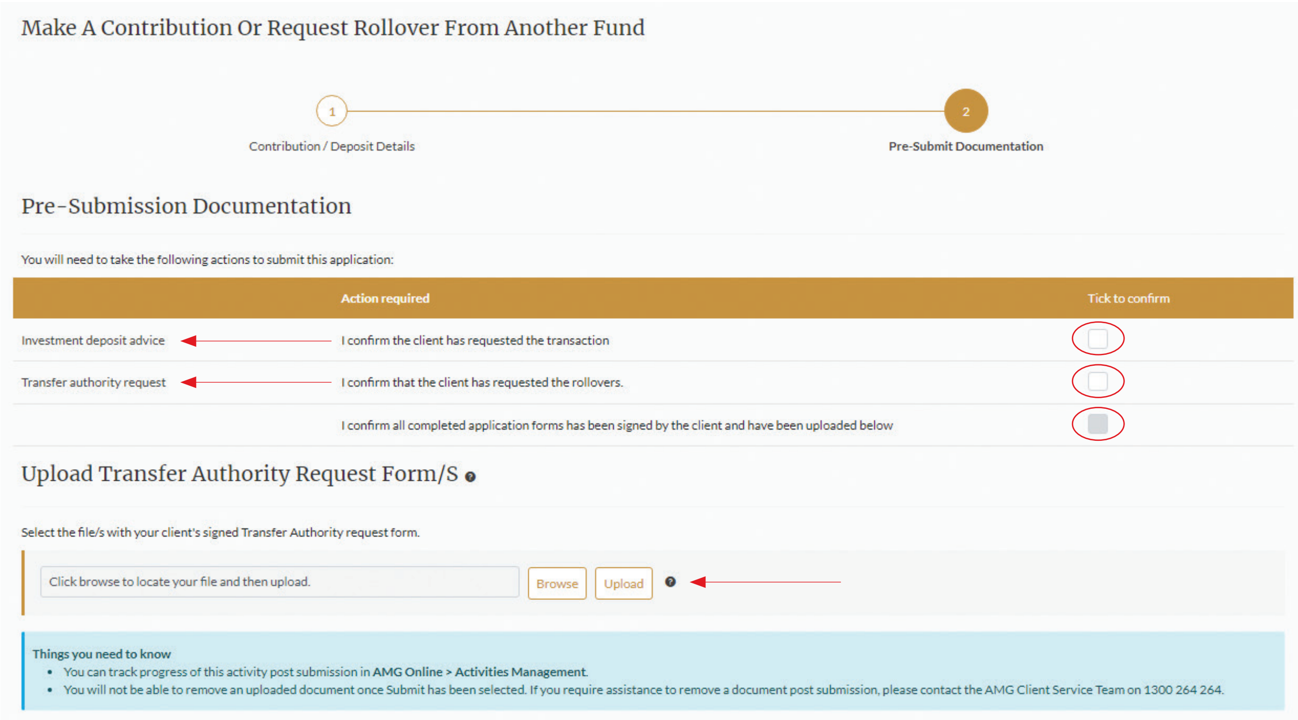
2. Select 'Full transfer' or 'Partial transfer'. For a partial transfer, please enter an 'Estimated Rollover Amount'.

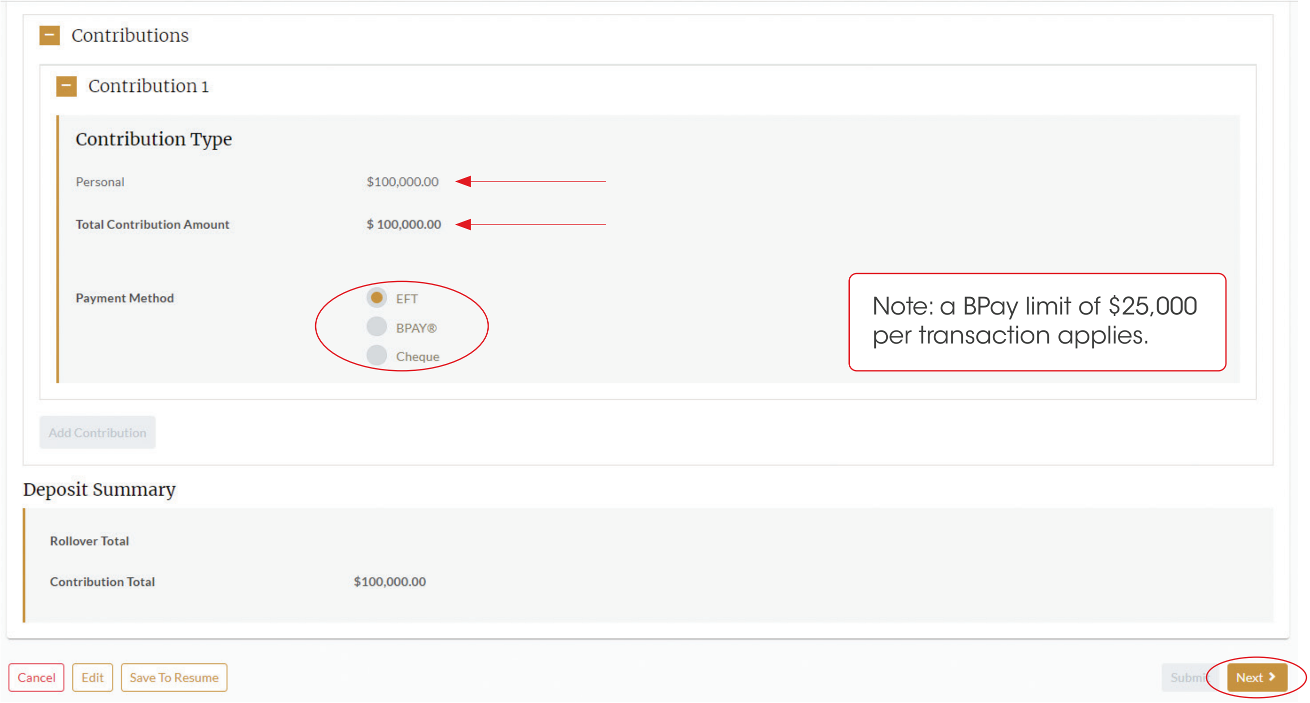


3. Click **[Next]** and download the pre-submission documents.
4. The *Transfer Authority Request* form will need to be signed by the member and uploaded in the pre-submission screen via the **[Browse]** and **[Upload]** buttons.
5. Tick the boxes to confirm all completed forms have been signed by the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

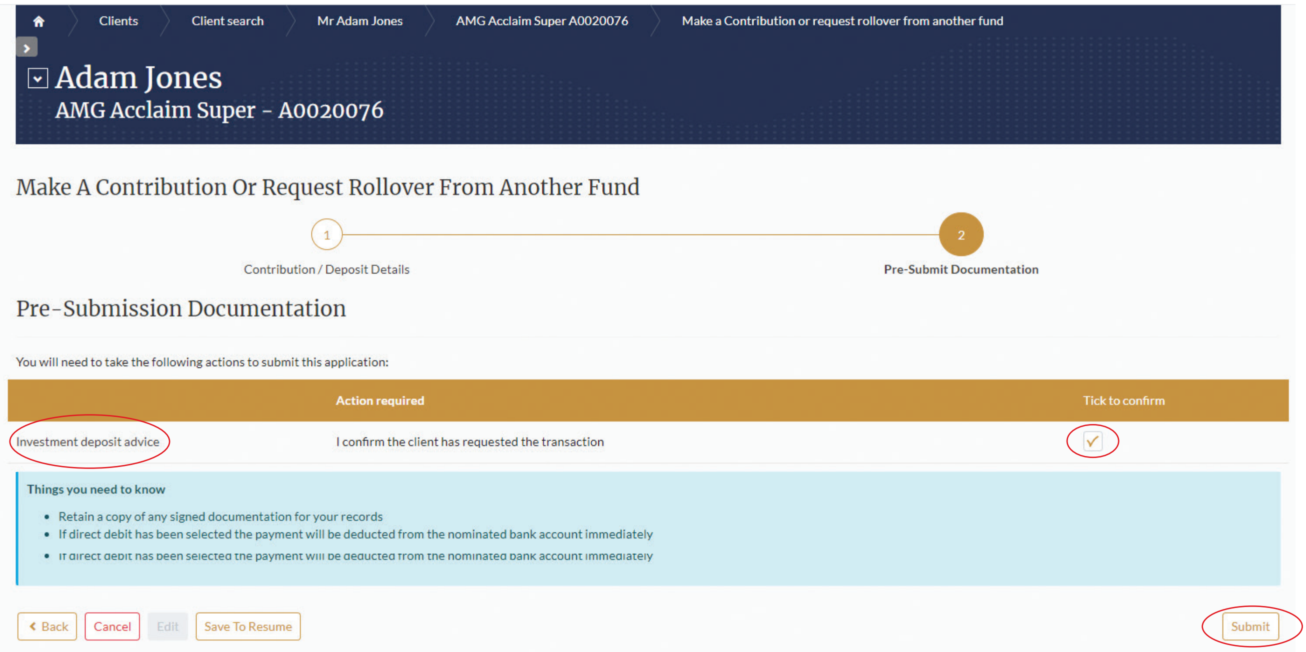


Making a personal or spouse contribution

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]**



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]**.



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