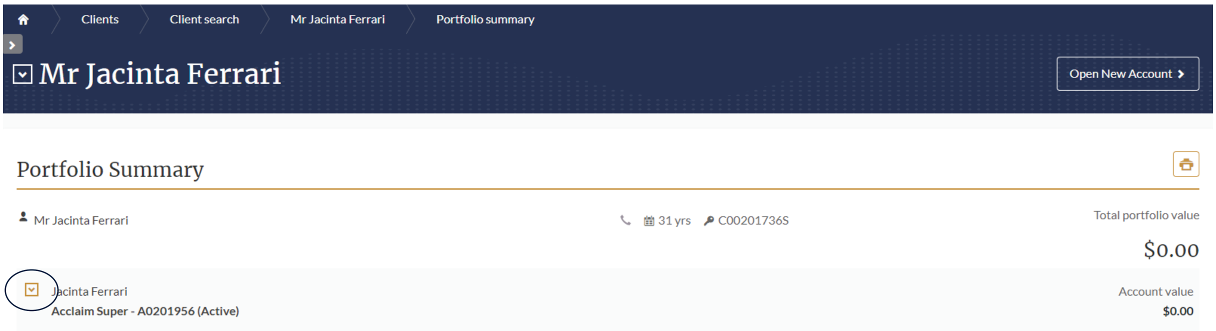
Create or Renew an Ongoing or Upfront Advice Fee Consent
Help Guide

The Acclaim portal allows you to add a once-off advice fee or ongoing advice fee online. The portal will generate the paperwork to be provided to your client to sign. Adviser Service Fees are deducted at the end of each month. All fee values, percentage or dollar based, upfront and ongoing are to be the value inclusive of GST.

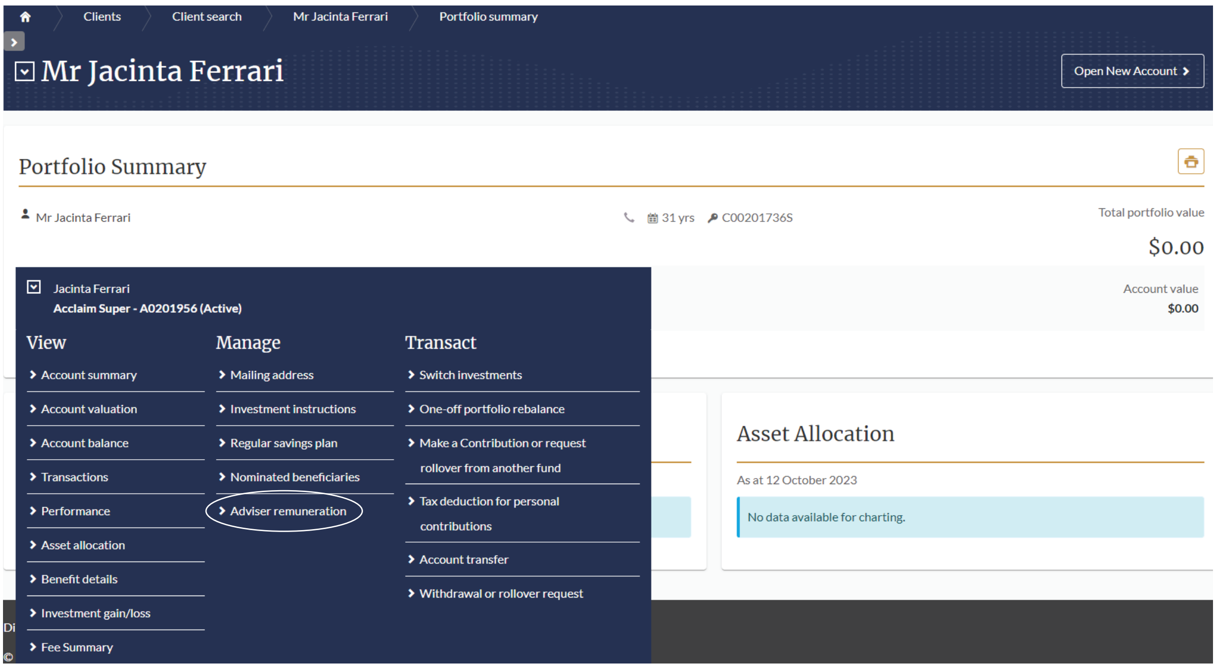
To engage in a **Fixed Term Agreement, please complete the Fixed Term Advice Fee Consent Form** available on the website www.acclaimwealth.com.au under 'General Forms'.

To make adjustments to an existing member's adviser service fees login to Acclaim Online and follow the below steps.

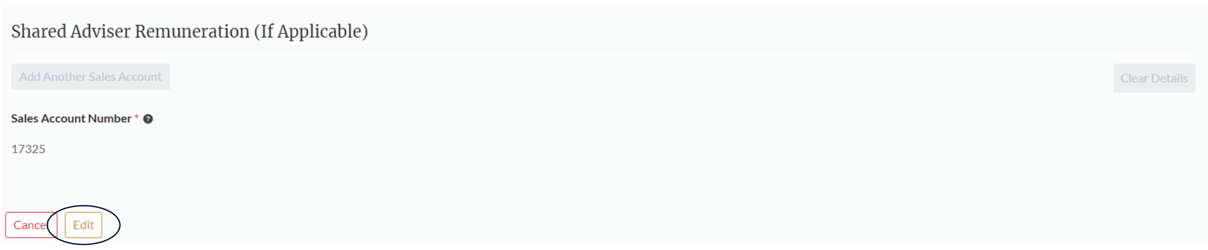
1. Search for your client using *Client Search* bar and select the gold down arrow **(v)** next to the relevant account.



2. Navigate to 'Adviser remuneration' in the *Manage* column.



3. Click **[Edit]** at the bottom left of the page.



Adding a once-off advice fee

1. Add the $ Amount including GST in the *'Adhoc service fee'* section.

Adding or renewing an ongoing advice fee

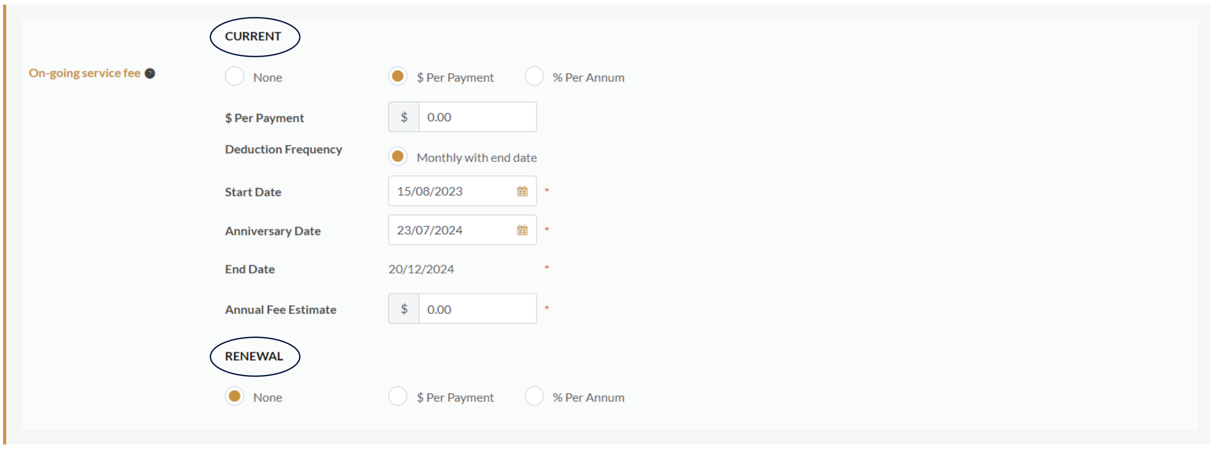
1. To add a brand **new** advice fee, enter details in the 'CURRENT' section under on-going service fee.

   A new fee is needed:

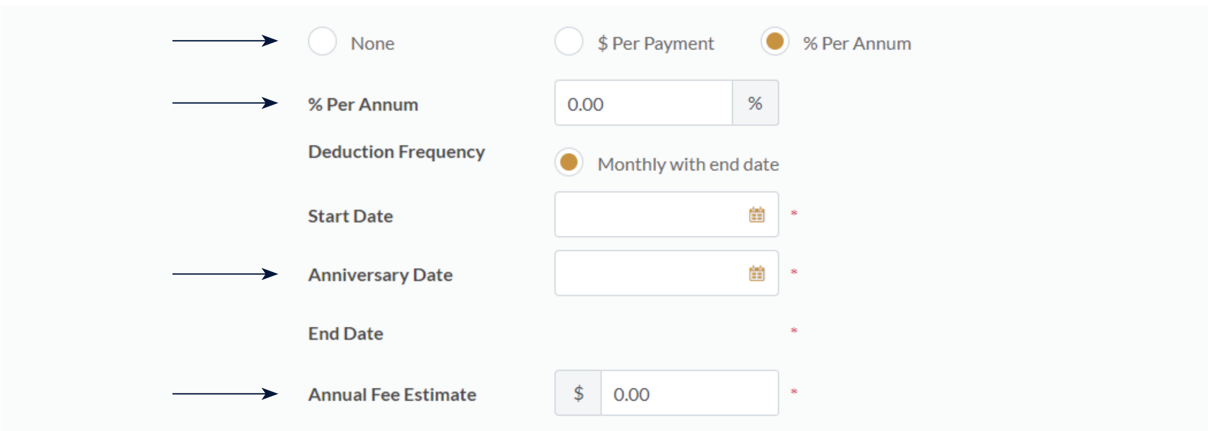
   a. Where there is no current fee arrangement; OR
   b. Where you would like to completely cease a previous arrangement (waiving the 150 day concession) to commence a new arrangement with different terms.

2. If there is a **current** ongoing advice fee that you wish to renew, enter new details in the 'RENEWAL' section.

   a. A renewal is needed where an updated FDS has been issued to continue a previous fee arrangement with your client; OR
   b. The previous fee arrangement 150 day grace period for payment is continued between the anniversary date of the previous fee arrangement and the start date of the renewed fee arrangement. Note: You will not be able to put a date prior to today's date as the start date of the renewed ongoing fee agreement.



3. Select '$ Per Payment' or '% Per Annum'.
4. The Annual Fee for *% Per Annum* is the account balance multiplied by the percentage being charged.
5. The *Anniversary Date* must be a maximum of 12 months from the *Start Date* and match the *Ongoing Services Agreement Start Date*.
6. The *Annual Fee Estimate* for $ Per Payment is the monthly advice fee multiplied by the number of months between the *Start Date* and *Anniversary Date*.



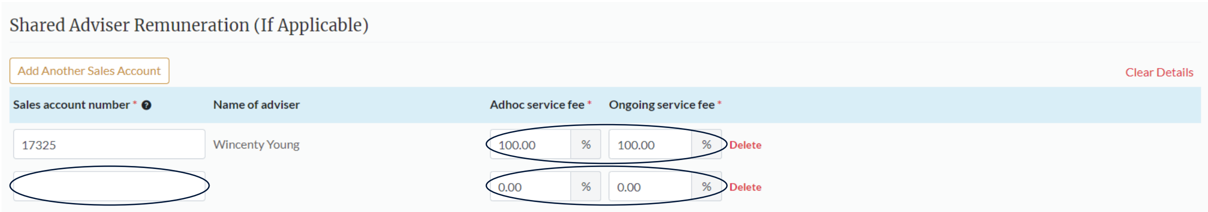
NOTE: Fees will continue to be charged for 150 days after the Anniversary Date.

Adding Shared Adviser Remuneration

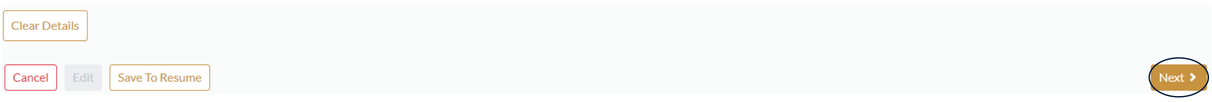
1. To share remuneration on this account with another adviser, click the **[Add Another Sales Account]** button.

2. Enter the second advisers' Acclaim adviser code as the 'Sales account number'.
3. Select the desired percentage split between the two adviser codes.

   Note: you can also elect to split the ad-hoc adviser fees where relevant.



4. Click **[Next]** at the bottom of the page once all advice fee details have been added.

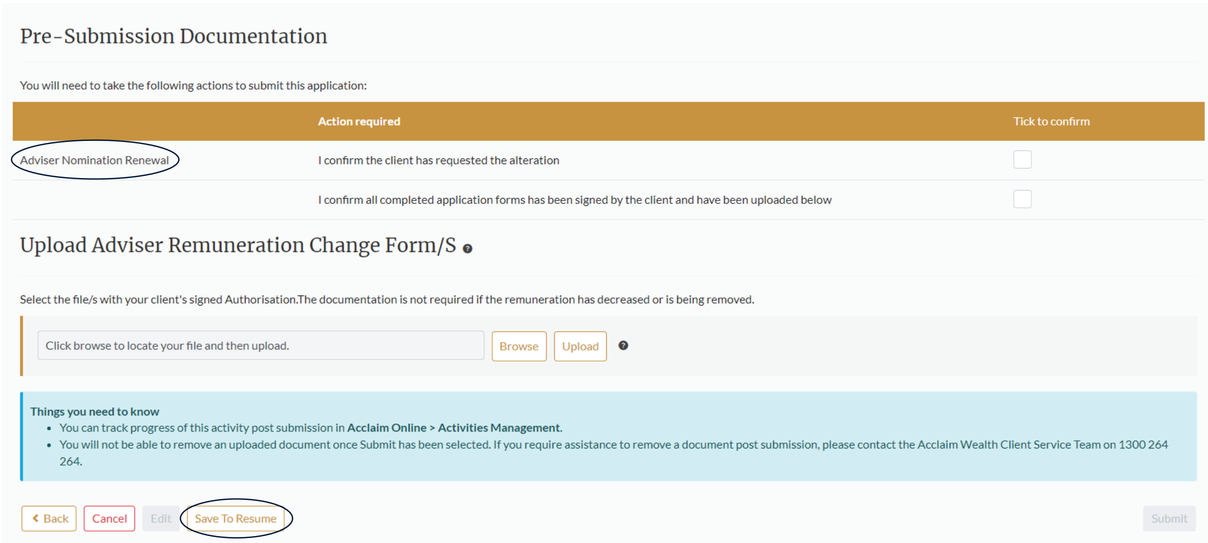


Pre-Submission Documentation

1. Click on all generated forms required for your clients to sign.

   NOTE: If you are removing or reducing a fee, we do __not__ require a client signature.

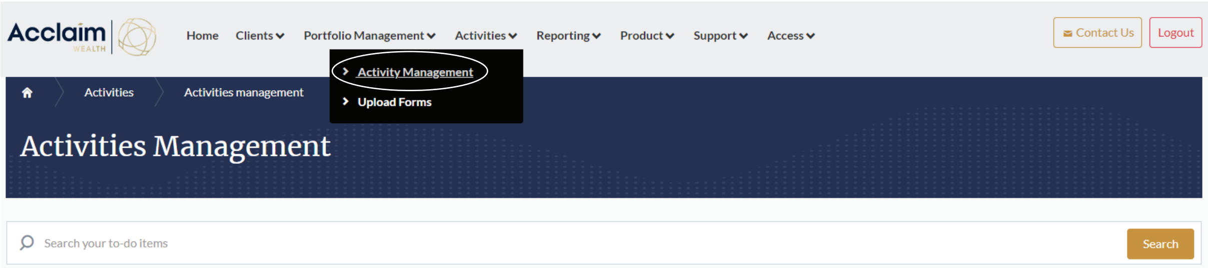
2. Click **[Save to Resume]** to save the progress of this activity and submit the signed documentation at a later date. You will be able to locate this activity in the future by referring to your 'not submitted' activities in 'Activity Management'.



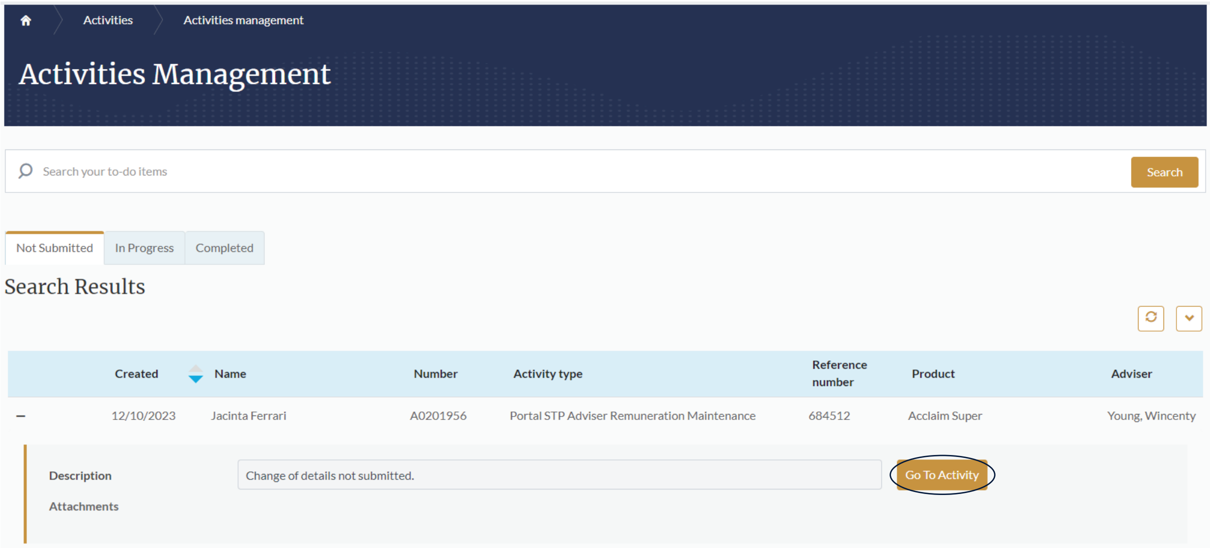
Submitting the Request

After your client has signed the forms, you will need to submit them to your open activity for the fee arrangement to become active.

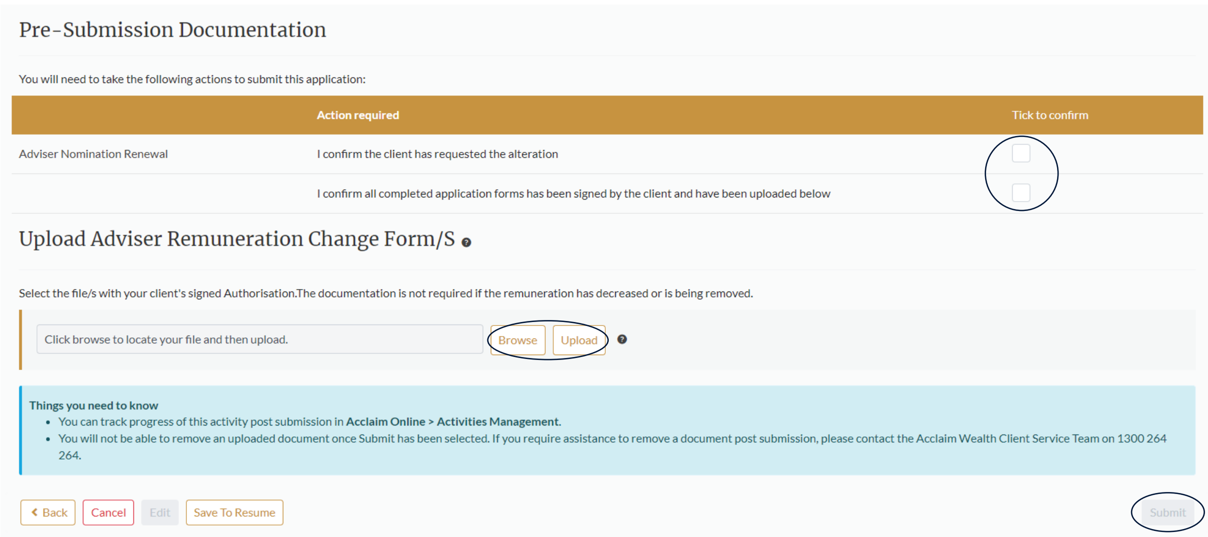
1. To find your adviser fee change request, go to *Activities* and select the 'Activity Management' option in the drop down.



2. Identify the activity in the *Not Submitted* tab and select the **[+]** sign.
3. Click **[Go To Activity]**.



4. Upload all required signed forms.
5. Check all 'Tick to confirm' options.
6. Once all steps have been completed, you will be able to select **[Submit]**.



Once submitted, you will be able to view your new fee arrangement by navigating back to the Adviser Remuneration menu item in the Manage Column of your client's account menu.

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