Have confidence managing your requests

Request Centre allows you to upload completed forms and see that your requests have been received and processed by us, or if we need further information from you. This is a faster and more secure way to submit requests to us, and we want to save you time by giving you visibility into the status of each request.

Key steps to using Request Centre

Ensure the form is completed and signed

Upload the form via Request Centre

Track the status of requests online

Ensure the form is completed and signed

You can find all our forms under the Tools and Resources section of Adviser Online. To ensure we can complete your request as quickly as possible, here's a quick checklist before uploading the form online:

- ✓ Complete all mandatory fields.
- ✓ Ensure the form is signed per account operating instructions (no electronic signatures).
- ✓ Check that there is available cash for any withdrawal requests.
- ✓ If there have been any changes on a form while being completed, ensure your client has signed in full next to these changes.

Upload the form via Request Centre

Request Centre is a faster and more secure way to submit your requests to us.

1. Log into Adviser Online
2. Select Request Centre from the main menu
3. Select 'New Request'
4. Select the category
5. Select or drag and drop the document(s) you wish to upload
6. Click on 'Submit'

Track the status of requests online

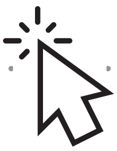
Once you've successfully submitted a request, the Request Centre landing page will refresh so you can start tracking the progress.

Please note that if you selected the 'all other requests' category when you uploaded the request, it may just take a few more minutes for it to appear on the Request Centre landing page.

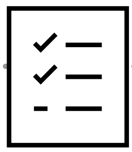
Your request will come under one of the following statuses:

Status	What does this mean?
Received	We've received your instructions and will commence processing as soon as possible.
In progress	Your instructions are currently being reviewed or processed.
Complete	Your instructions have been completed. Please note some changes may not show online until the following business day.
Awaiting adviser	We need additional information or documents.
Not completed – awaiting adviser	We couldn't complete your instructions as we didn't receive the required information.
Cancelled	We've received instructions to not proceed with this request or it's a duplicate request.
Reclassified	Your request has been reclassified to another category and will be completed as a separate request, which can be viewed by searching for your client.

When additional information or documents are required, we'll contact you (generally within the day, based on submission time) to request additional information. To upload additional documents for a request, follow these steps:



1. Click into the request from the landing page



2. Select the appropriate files from your computer to upload, or drag and drop the file

3. Click on Submit

Once you've submitted the additional documents or provided information, the status of the request will update to 'In Progress' as we review and continue to process your instructions. You'll also be able to view any of the documents you've uploaded via Request Centre online.

Making request management easy

You can easily manage your requests by using these filters:

- Date or time period
- Client or account
- Request type
- Status i.e. all requests awaiting adviser

When will my request be completed?

The following provides a general guide to processing times when fully completed forms are submitted.

Request Type	Turnaround time	Cut off (Sydney time)
Applications	1 business day	4pm
Payments		
Withdrawal - Investment accounts (excluding Investment Accumulator)	Overnight	2pm
Withdrawal - RTGS	Same Day	12pm
Withdrawal – Super/Pension & Investment Accumulator accounts	Overnight	11am
Account Maintenance		
Update contact or account details	1-2 business days	4pm
Recurring payments	1-2 business days	4pm
Fees and Adjustments	1-2 business days	4pm
Super to Pension Switches	2 business days	4pm
Pension set-up	2 business days	4pm
Asset Transfers	5 business days	4pm
Account Closures		
Cash account closure	Overnight	2pm
Investment account closure	3 business days	11am
Super/pension account closure	3 business days	11am

Important information

- Estimated completion times are general in nature and are based on fully completed requests with all supporting information received at the time of submission.
- Items received on non-business days or a public holiday will be processed the following business day.
- Please refer to the important information and terms and conditions on the form for the request you're submitting. Additional supporting documents may be required for some request types or circumstances.
- Some requests, such as asset transfers and rollover requests, require us to liaise with third parties, like other platforms or registries. Some third parties may have different cut off times to us and any delays in receiving the information required will impact the time it takes to complete a request.
- For withdrawal and closure requests, cash must be available in the account before submitting the request. For IDPS accounts, assets must be sold to cash or transferred out before a closure can be completed.
- The completion time for account closure requests may be impacted by events such as managed fund and distribution payments, tax processing.
- Your submitted requests may be subject to our verification processes.