

# Selection of Platform Fund Policy Owner for Accelerated Protection

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# 1. Quote

## 1.1 Select Platform Super Fund

The initial step to defining a specific Fund as the policy owner, the user selects PLATFORM SUPER FUND

Reference No:

The screenshot displays a software interface for creating a quote. It is divided into several sections:

- Life Insured Details:** Includes an 'Add Life' button and a dropdown menu currently showing 'PLATFORM AOW'. Buttons for 'Edit Life', 'Remove Life', and 'Loading' are present.
- Policy Details:** Includes an 'Add Policy' button and a dropdown menu currently showing 'PLATFORM AOW'. Buttons for 'Add Life to Policy' and 'Remove Policy' are present.
- Policy Ownership:** A dropdown menu is open, listing options: 'Life Insured', 'TAL Super', 'Platform Super Fund' (highlighted), 'Self Managed Super Fund', 'Company', 'Trustee', and 'Other/Joint'.
- Payment Frequency:** A dropdown menu set to 'Monthly'. Buttons for 'Add Life to Policy' and 'Remove Policy' are adjacent.
- Life Plan:** A checkbox is checked. Below it are checkboxes for 'Stand Alone TPD', 'Stand Alone CI', 'Income Protection', and 'Business Expense'.
- Navigation:** Buttons for 'Summary', 'Illustration', and 'Projections' are at the bottom.
- Quote Summary (Right Sidebar):**
  - Quote Summary:** \$486.36
  - Total Annualised Premium:** \$486.36
  - Policy 1:**
    - P AOW \$40.53**
    - Life Plan \$40.53
    - Life- \$1,000,000
    - Stamp Duty \$0.00
    - Policy Fee \$0.00
  - Total Premium \$40.53 (M)**
  - Legend: (M) – Monthly; (Q) – Quarterly; (H) – Half Yearly; (Y) – Yearly
  - Buttons: 'Calculate', 'Apply', 'Save', 'Exit'

On APPLY the user is then presented with the Accelerated Protection online Application.

## 2. Application – Policy Owner selection

The user can go directly to the Policy Ownership page by selecting the Policy Owner Details link or navigate thru page by page.

| Navigation & Progress       |                                                |                 |
|-----------------------------|------------------------------------------------|-----------------|
| <b>Application Summary</b>  |                                                |                 |
| Policy                      | Life Insured Name                              | Plan            |
| 1                           | PLATFORM AOW                                   | Life Plan       |
| <b>Application Progress</b> |                                                |                 |
| Stage                       | Details                                        | Progress Status |
| Quote                       | <a href="#">Quote Details</a>                  | ✔ Complete      |
| Duty of Disclosure          | <a href="#">Duty of Disclosure</a>             | ✔ Complete      |
| Applicant Details           | PLATFORM AOW                                   | ✘ Incomplete    |
|                             | <a href="#">Personal Details</a>               | ✘ Incomplete    |
|                             | <a href="#">Occupation Details</a>             | ✘ Incomplete    |
|                             | <a href="#">Tele-interview Service</a>         | ✘ Incomplete    |
|                             | <a href="#">Health &amp; Lifestyle Details</a> | ✘ Incomplete    |
| Assessment Summary          | Assessment Summary                             | ✘ Incomplete    |
| Policy Details              | Policy 1                                       | ✘ Incomplete    |
|                             | <a href="#">Policy Owner Details</a>           | ✘ Incomplete    |
|                             | <a href="#">Payment Details</a>                | ✘ Incomplete    |
| Finalise Application        | Finalise Application                           | ✘ Incomplete    |

Exit Continue

### 2.1 Policy Ownership Details Page

#### 2.1.1

the following page is presented

Reference No.: C90178771      Policy 1  
 Life Insured 1: PLATFORM AOW Navigation

Quote > Applicant Details > Health & Lifestyle Questions > Assessment Summary > **Policy Details** > Finalise Application >

**Policy Owner Details** ▪ indicates a mandatory field

Name of Platform: ▪ Please Select ▼

Save and exit    Continue

#### 2.1.2 Fund Selection

The user selects the required superannuation fund from DDL

**Policy Owner Details**

|                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of Platform: | <ul style="list-style-type: none"> <li>▪ Please Select</li> <li>IOOF Pursuit – Super</li> <li>netwealth Investments Limited</li> <li>HUB24 Super</li> <li>e-Clipse Super</li> <li>Yellow Brick Road Super</li> <li>RetireSelect</li> <li>Praemium SuperSMA</li> <li>Linear Managed Accounts – Super &amp; Pension</li> <li>Powerwrap Master Plan</li> <li>Fiducian Superannuation Service</li> <li>Annex - IOOF Pursuit Select Personal Superannuation</li> <li>Annex - IOOF Pursuit Focus Personal Superannuation</li> <li>Bendigo SmartOptions – Super</li> <li>vMAPs Superannuation</li> <li>EndeavourSuper</li> <li>brightday</li> <li>Federation Alliance Superannuation Fund</li> <li>AMG Super</li> <li>mobiSuper</li> <li>Mason Stevens Super</li> </ul> |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### 2.1.3 Policy Owner Details

On selection the protected Trustee details are presented

**Policy Owner Details**

|                   |                                             |
|-------------------|---------------------------------------------|
| Name of Platform: | ▪ Linear Managed Accounts – Super & Pension |
| Owner:            | Linear Asset Management Limited             |
| ABN:              | 11 119 757 596                              |
| AFSL:             | 304542                                      |
| Address Line 1:   | Level 9, 525 Flinders Street                |
| Suburb:           | Melbourne                                   |
| State:            | VIC                                         |
| Postcode:         | 3000                                        |
| Telephone number: | 1300 669 891                                |

**Policy Owner Details**

|                   |                                           |
|-------------------|-------------------------------------------|
| Name of Platform: | ▪ Federation Alliance Superannuation Fund |
| Owner:            | Diversa Trustees Limited                  |
| ABN:              | 49 006 421 638                            |
| AFSL:             | 235153                                    |
| Address Line 1:   | Level 20, 357 Collins Street              |
| Suburb:           | Melbourne                                 |
| State:            | VIC                                       |
| Postcode:         | 3001                                      |
| Telephone number: | (03) 9616 8600                            |

# 3. Application – Payment details

## 3.1 Payment Details Page

On CONTINUE, the user is presented with Payment Details page where previously selected Fund is defaulted and protected.

**Payment Details**

Payment Frequency: Monthly  
Payment Amount: \$40.53  
Payment Method: Platform Account

Name of Platform: Linear Managed Accounts - Super & Pension  
Platform Account Holder: Individual  
Platform Account Number:

*To authorise premium payments, ensure the appropriate Linear Management Accounts – Super & Pension authorisation has been completed & submitted to Linear.*

Platform Account First Name:   
Platform Account Last Name:

**Payment Details**

Payment Frequency: Monthly  
Payment Amount: \$40.53  
Payment Method: Platform Account

Name of Platform: Federation Alliance Superannuation Fund  
Platform Account Holder: Individual  
Platform Account Number:

*Must only be a valid Federation Alliance account.*

Platform Account First Name:   
Platform Account Last Name:

Platform Account Number will accept TBA or a valid account number. If the entered account number does not meet the provided validation rules, an error message is presented - **This is not a valid account number. If a valid number cannot be provided please enter TBA.**

If the incorrect Fund has been chosen then the user selects BACK to be returned to Policy Owner Details page to select the correct fund.