

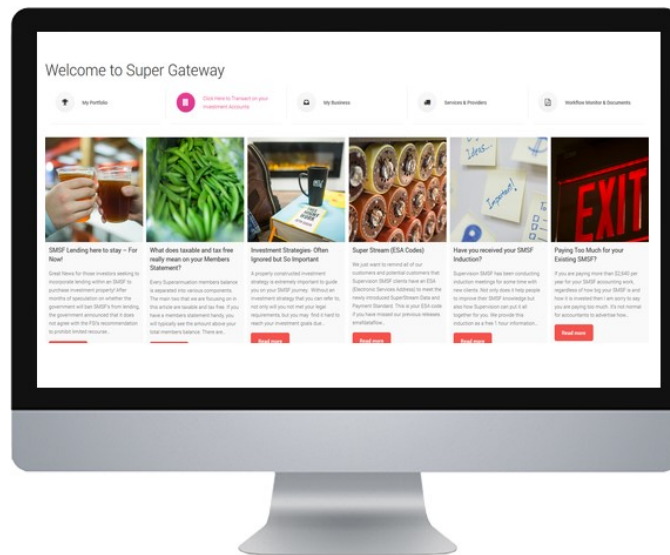
# Supervision GROUP

## Guide to Super Gateway

December 2017

# Welcome to Super Gateway

We hope using Super Gateway will help you to stay in touch with your Investments which will lead to better financial outcomes.

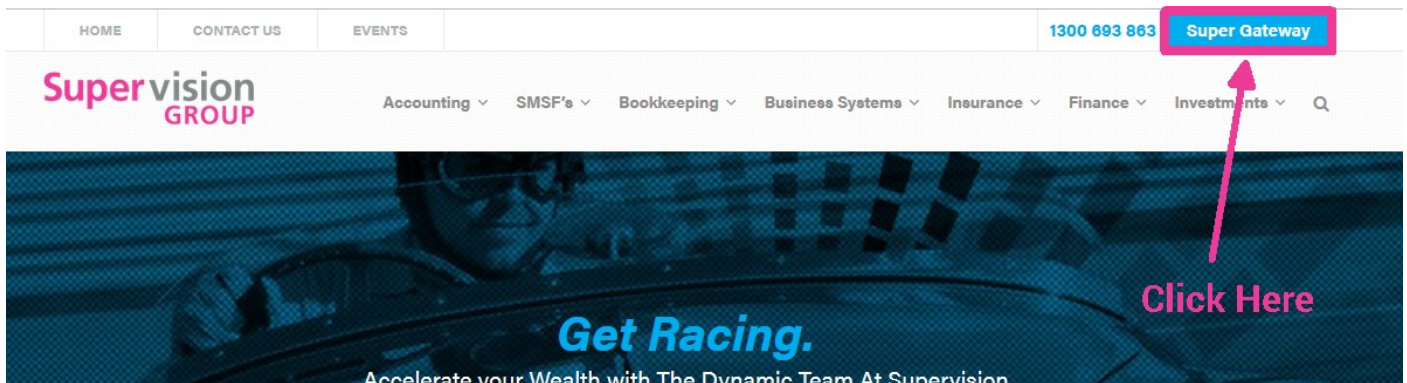


## What is it?






Your SMSF, Business, Trust accounts have many moving parts. You will have at the very least a Bank Account and can have Online Broking Account, Term Deposit Platform. You may also choose to add a managed share account, share research tool and other add-on's from preferred suppliers. The aim of Super Gateway is to provide you with links to these providers and your portfolio in one place. We do this by providing Icons that correspond with various actions that you want to undertake.

## How to gain Access to Super Gateway?


Super Gateway does not require passwords. You can enter by clicking on the "Super Gateway" link on the Supervision website [www.supervision.com.au](http://www.supervision.com.au).



# Welcome to Super Gateway

-  My Portfolio
-  Invest & Transact
-  My Business
-  Services & Providers
-  Workflow Monitor & Documents

Once you have clicked on the Super Gateway link, you will land on a page that has a number of articles and a series of icons on the top row.

 My Portfolio

When you click on this link you will be taken to your online portfolio. This is your view of your Investment Reports and records for your SMSF, Family Trust or any other Entity that contains investments. All of your banking transactions, investments, contributions, pensions and performance are here. This section requires a username and password that we will send to you. Once established you can maintain your password for “My Portfolio” at any time and request a password refresh if you forget it. Please request access from our team today by calling our office.

“My Portfolio” has a large array of information about your SMSF or Non SMSF assets at your disposal, too much to fully explain in this document.


Supervision SMSF | Welcome Chris@supervision.com.au | powered by Class

Home Valuation Bank Contributions Pensions Performance Reports Details

Sales Demo Superannuation Fund ▼ Current Value: **\$8,189,333.43**

### What is my portfolio worth?

Market Valuation Over Time



More details →

### How much do I need to withdraw?

**\$342,370.00**

Withdraw this remaining amount of the minimum pension limit by **30 Jun 2016**.

More details →

### How much can I contribute?

<b>Mr David Beckham</b>	
Conc.	\$35,000.00
Non-Conc.	\$180,000.00
<b>Mrs Victoria Beckham</b>	
Conc.	\$35,000.00
Non-Conc.	\$180,000.00

Please note: due to the 2016 Federal Budget, the non-concessional contribution caps shown above no longer apply. For further information, please click [here](#).

More details →

### My top performers\*

▲ Medibank Private Limited (ASX:MPL)	48.42%
▲ Challenger Limited (ASX:CGF)	36.66%
▲ Facebook Inc (NASDAQ:FB)	36.38%

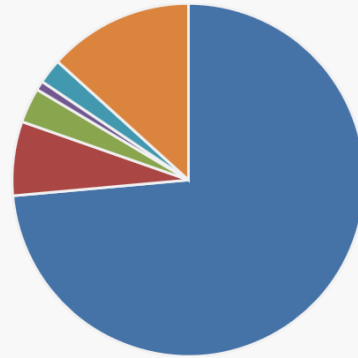
### My bottom performers\*

▼ Australia And New Zealand Banking Group Limited (ASX:ANZ)	-24.34%
▼ BHP Billiton Limited (ASX:BHP)	-31.68%
▼ Bank of China Ltd (HKEK:3988)	-41.25%

\* Total % return for this financial year

[More details →](#)

### What am I invested in?



Australian Equities	73.57%
Cash	6.79%
Direct Property	3.2%
Foreign Cash	0.85%
International Equities	2.29%
Listed Property	13.3%

[More details →](#)

### What are my latest bank movements?

7 Apr 2015 QUB 2.7C FRANKED @30%; D.R.P. + \$2,511.00

My Portfolio is based on executive dashboards that are designed to give you snapshots of your portfolio and also extra details when they are required. By clicking the “More details” link in every square you are able to dive deeper into the details.

### Here are some of the “Most Loved” Features

#### Valuation

In order to make sure that your investments are headed in the right direction, this section provides all the information you need to track your investments. The advantage of “My Portfolio” is that all of your investments are listed in the one place to show your consolidated wealth in each entity. All listed assets will be revalued daily to reflect market movements including bank account balances.

#### Banking

You can view all of your banking transactions line by line just like you can on your bank statement. It also shows you how that transaction has been coded by our team of professionals. If you have multiple bank accounts you can view them all in this section.

#### Contribution Caps (SMSF's Only)

To avoid going over the contribution caps or just checking that your contributions are reaching your bank account, this section has all the information you could dream of. It breaks down contributions by members and creates a living cap calculator which tells you how much you can contribute. This is extremely important when you want to plan salary sacrifice or personal concessional contributions.

#### Pensions (SMSF's Only)

If your SMSF is providing you with a pension, you need to make sure you take out enough to meet your minimum requirements. “My Portfolio” makes that simple by calculating pensions taken for each member and telling you how much is left to draw.

## Unrealised Capital Gains

Our report breaks down every share into their purchase parcels and gives you an up to date capital gain or loss profit or loss each parcel has before taking action.

## Performance Report

The performance report outlines total return values & total return as a percentage for every holding in your portfolio. In addition there is a time weighted average comparison to major indices to see how your investment strategy compares.

## Fund Reports

All of your historical accounting information is stored in this section. Download your P & L, Balance Sheet, Members Statements from any period for any requirement.

“My Portfolio” is the result and output of the Supervision Teams commitment to Real Time administration and bookkeeping, unlisted assets or accounts without datafeeds may not be up to date at all times.



Invest &  
Transact

Upon clicking into Invest & Transact, you will enter a place where you can complete investment transactions. These are the working parts of your SMSF, Family Trust or Business Investment accounts.

From this screen you will be able to login to complete your Banking Transactions, Listed Securities Purchases and Sales, Term Deposit Placement and many more. This section is expected to grow over time to give you more options. If you have recently established your SMSF, Family Trust, Partnership or other Entity with Supervision, you will have a Bank Account, Term Deposit Platform and Online Broker already established for you. These accounts can be accessed from this page. All other Icons on the Invest & Transact page are available but not compulsory.



My Business

Supervision has provided a link to Xero so that if you want to complete your business transactions online you can go there and start using it. You can do all of your small business accounts on the move using Xero. Xero is our current preferred partner for business and personal accounting. Supervision has chosen Xero as our preferred accounting software provider for our Business clients.



Services &  
Providers

This section showcases all of the providers that we provide on our approved suppliers list. We have included information about how they actually work with videos and contact details for your convenience. Our aim is for you to get the information you need in one place without leaving the Supervision website. This list is set to grow, so to learn more about our providers, please feel free to look through each company in this section to see how they could help you.



Workflow  
Monitor &  
Documents

Supervision holds your documents securely in electronic format. We also have a sophisticated workflow monitoring system that helps us track the work on your accounts. If you want to view all of the jobs on your investment entities or business account and then download documents, then you can do so here. You can gain access by calling us and establishing an account. We now have a space where you can create documents for your SMSF. As a customer of Supervision you will receive a discounted price for your document.

### **Why Use Super Gateway?**

Super Gateway brings you to our website to interact with your Investment Assets & Accounts. It is the central hub where you can view your portfolio, read our latest blog article and also complete transactions. We want Super Gateway to be the “one stop shop” for all your needs. But what you see now will change and evolve as you would expect. We will upgrade and add on to the current list of providers, articles, services and so much more, so please don't think you have seen it all, because we aim to surprise.

### **Lost & Forgotten Passwords**

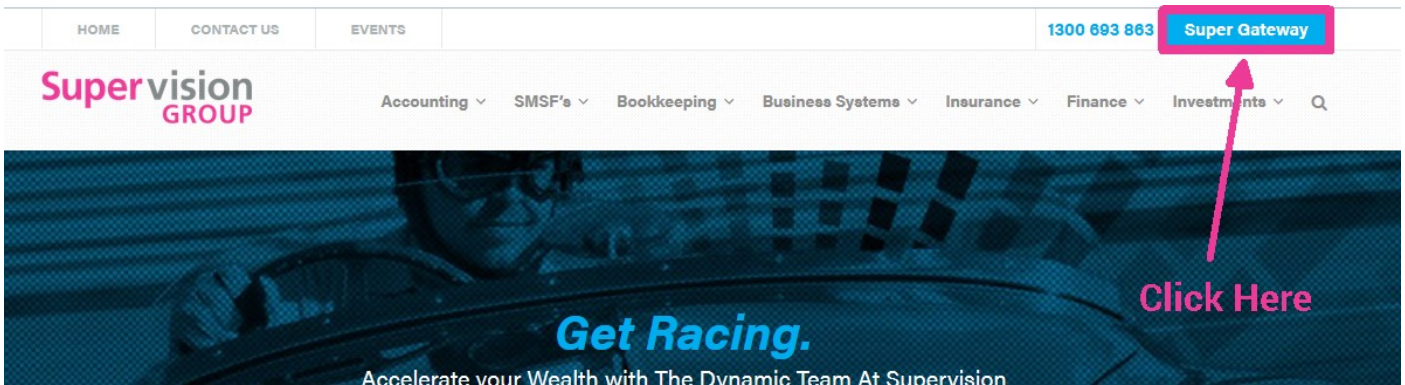
All third party suppliers like your online banking facilities and online broker will supply usernames and passwords independently of Supervision. This means that Supervision does not have any control over your trading accounts and does not store or have access to your usernames and passwords. The advantage is that you are able to receive notification of a lost password when our offices are closed.

### **Is Super Gateway safe?**

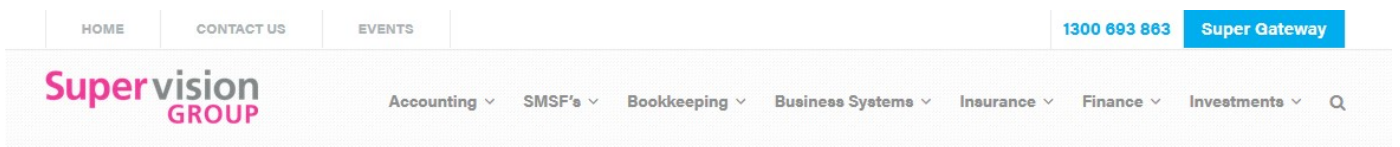
Supervision does not store your usernames or passwords for your online trading accounts on our website or in our databases. You are always in control over your usernames and passwords. It is advisable to take IT precautions that reduce the likelihood of stolen usernames and any other online facilities. Changing passwords regularly and updating spyware and virus protection is always advisable.

# Where can I find Super Gateway?

go to: [www.supervision.com.au](http://www.supervision.com.au) , click <Super Gateway>



## What will I see?

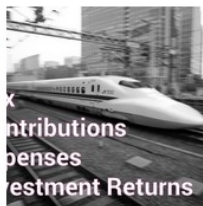


## Welcome to Super Gateway



Budget 2016/17  
Changes to Super

2016 Federal Budget  
There have been some big changes in to



Contributions  
expenses  
Investment Returns

Unlock SMSF  
Speed X 4

There are four factors  
that contribute to better  
Super outcomes:



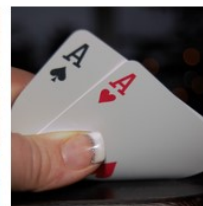
Investment  
Strategies- Often  
Ignored but So  
Important

A properly constructed



Are we there yet?

Since April 2015 the All  
Ordinaries index  
representing the  
Australian share market



Don't Leave 2016 to  
Chance

The end of year break is  
typically a time where  
we reflect upon the year



Property Gateway -  
Putting all the  
SMSF property  
pieces together

Supervision SMSF is

# Contact Us

Contact Number 1300 693 863 or 08 9367 9655

## Email Address

New enquiries email: [info@supervision.com.au](mailto:info@supervision.com.au)

Mail email: [mail@supervision.com.au](mailto:mail@supervision.com.au)

Accounts email: [accounts@supervision.com.au](mailto:accounts@supervision.com.au)

Blog replies: [hello@supervision.com.au](mailto:hello@supervision.com.au)

## Corporate Directory

Supervision Superannuation (Australia) Pty Ltd (ABN: 54 105 828 117)

Supervision SMSF Solutions Pty Ltd (ABN: 47 134 666 596) AFSL: 435751

## Office Address

South Perth: Level 2, 76 Mill Point Road, South Perth, WA, 6151

