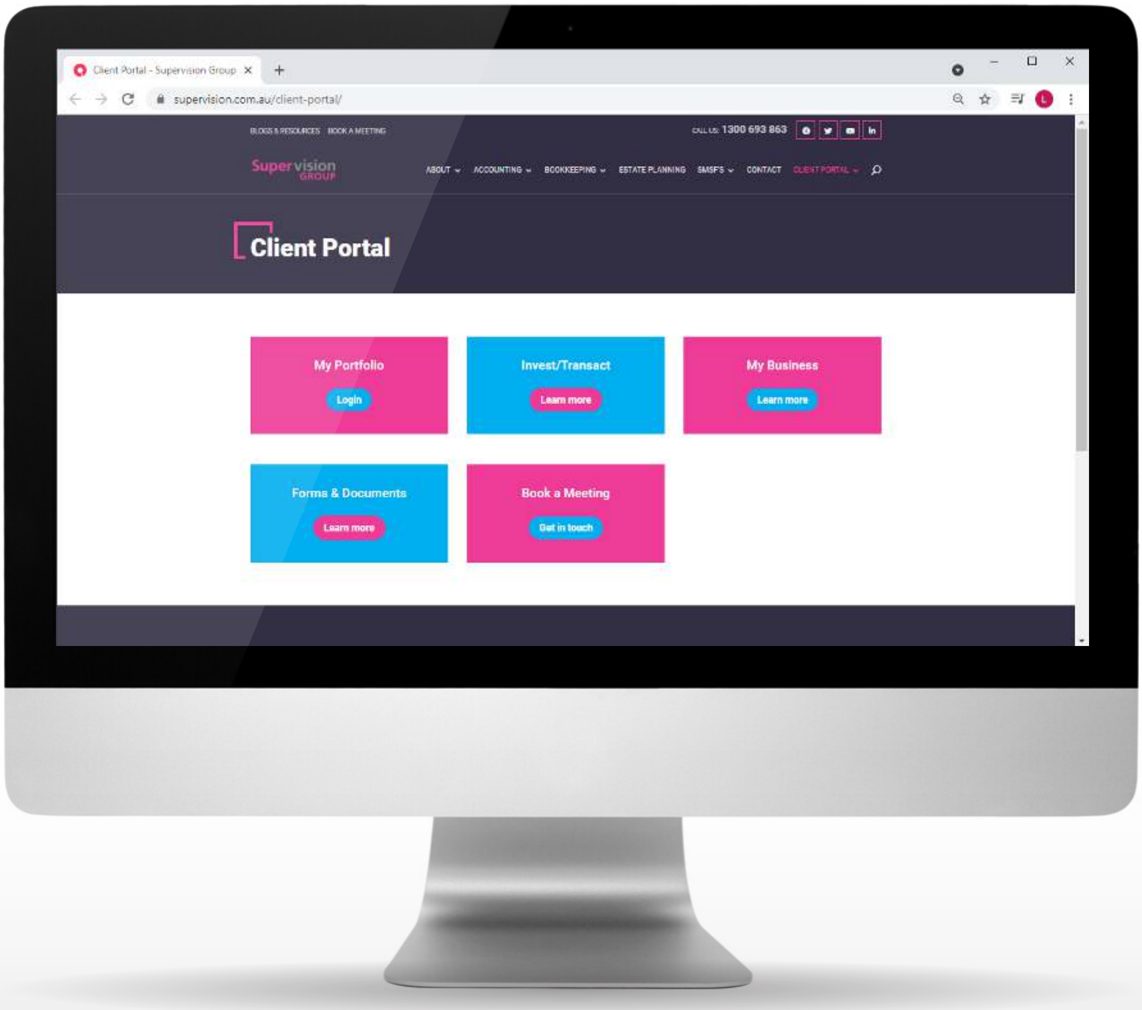
GET STARTED AT YOUR

SUPER PORTAL

2021/22



Your SMSF on the CLOUD

Get Started

WELCOME TO SUPER PORTAL

Our vision is to help people take control, grow knowledge, get great results and live their dreams.

Super Portal is our way of helping clients take control over their SMSF and put in place an outstanding investment strategy so they can live their dreams.

What is it?

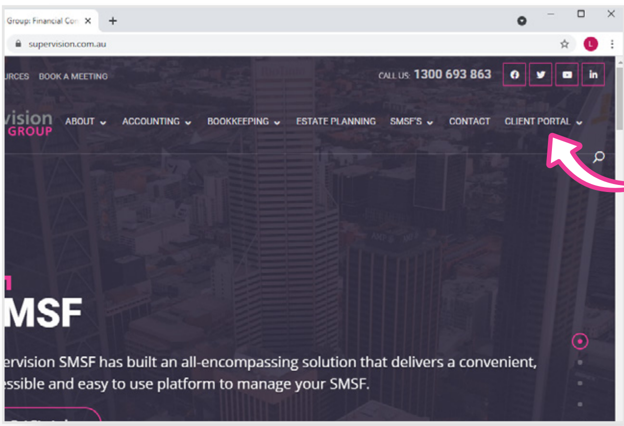
Supervision have developed a secure, easy to use interface which brings you all of your SMSF requirements in one place. Our unique approach is available to you today as a valued client of Supervision. Its a free service included in every service package.

With your SMSF being updated on a daily basis, you will be able to view your SMSF valuation, performance, contributions, pensions, capital gains, annual reports and other important information. It provides links to third party suppliers such as banks, share trading platforms, managed portfolio's and more.

How can I gain access to Super Portal?

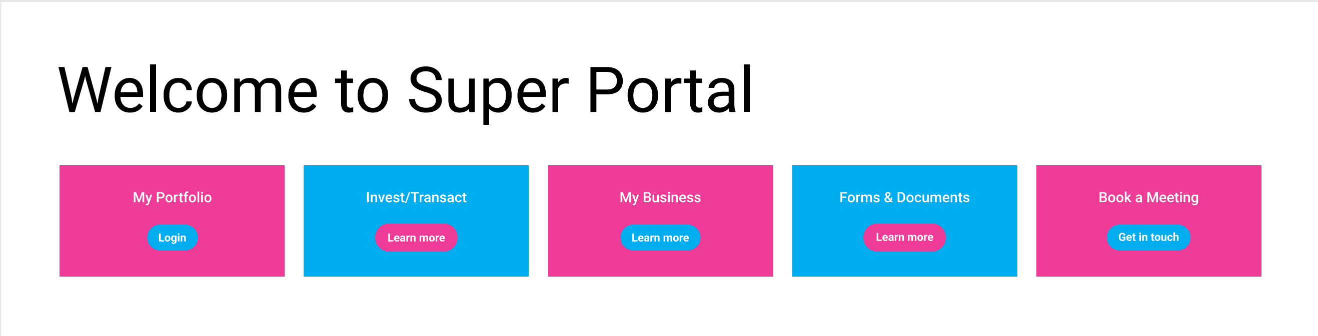
Super Portal is a open page on our website that does not require a password. You can enter by clicking the "Client Portal" link on our website:

www.supervision.com.au

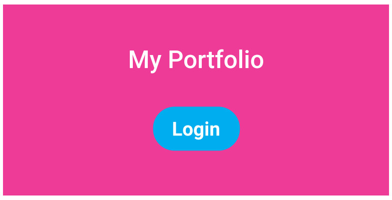


Why Is Super Portal So Popular?

Supervision leverages the latest SMSF technology to provide a place where you can engage with your Super.



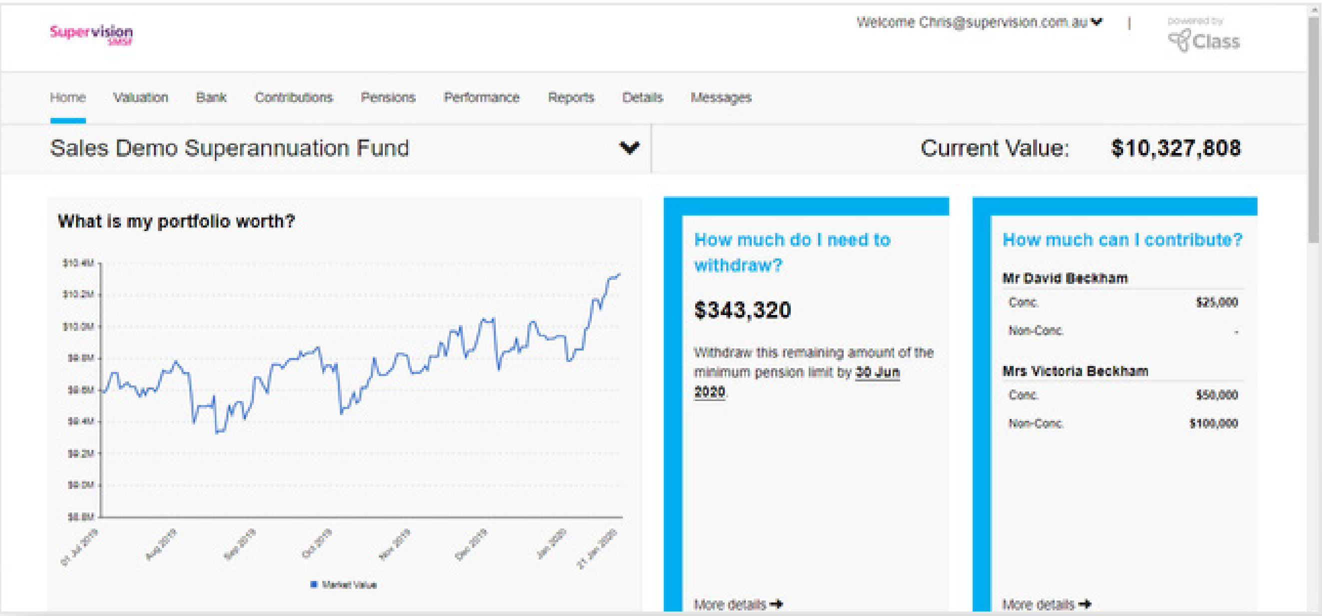
Once you have clicked on the Super Portal link, you will land on a page that has a number of articles and a series of icons on the top row. By clicking the icon for the page that you want to view, you will be transported there.



Click Here

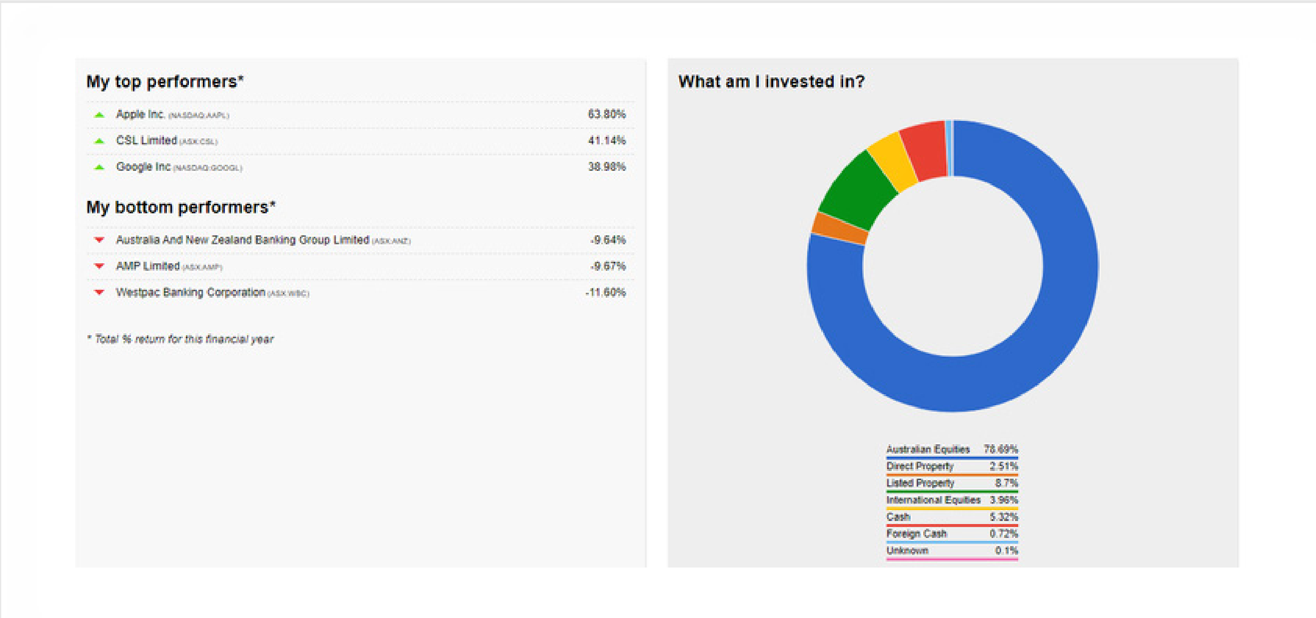
When you click on this link, you will be taken to your online portfolio. This is your view of your Investment reports and records for your SMSF, Family Trust or any other entity that contains investments. All of your banking transactions, investments, contributions, pensions and investment performance 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, if you have not already received it.

"My Portfolio" has a vast array of information about your SMSF. This document is not big enough to cover every detail, but keep reading for the most loved features.



Why Is Super Portal So Popular?

Putting together a formidable investment strategy is made extremely simple when you have access to all of your investment information in one screen.



Your opening page on "My Portfolio" is based on executive dashboards that are designed to give you snapshots of your portfolio which lead to extra details when they are required. By clicking the "More Details" link you will be transported to a page which expands on the dashboard details.

"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 on one screen showing your consolidated wealth for your SMSF (or investment trust).

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 this section will reveal all of these accounts.

Contributions (SMSF's Only)

To avoid exceeding your concessional and non concessional limits without needing to comb through bank statements or creating a spreadsheet, this section will take care of all the hard work. It breaks down all contributions by members and creates a real time cap calculator which not only adds all current contributions, but works out how much is remaining in your cap. Salary sacrifice or personal concessional contributions calculations are made easy with this screen.

Pensions (SMSF's Only)

Pensions have a minimum withdrawal requirement each year. "My Portfolio" will give you an updated total of all members pension drawings and the latest minimum requirement to ensure you meet your minimum requirements. Like the contribution screen, the total is updated frequently, so you will not need to wonder how much is required to be withdrawn.

Unrealised Capital Gains

Our report breaks down every share into its individual purchased parcels and gives you an up to date unrealised capital gain or loss report based on the last closing price for those holdings. This feature is extremely important for SMSF's who trade in shares on a regular basis and need to know the history of their previous purchases in detail.

Share trading platforms will average out the cost of shares and provide a profit percentage. This may be misleading when parcels are bought and sold. Our reporting feature will give you the most accurate view of how the SMSF's accounting profit is tracking.

Performance Report

The performance report outlines total return values & total return as a percentage of every holding in your portfolio. To make the performance report more functional, the time weighted average can be compared to major indices including ASX top 50 and others. You can use this feature to compare your investment strategy to some base standards as a KPI.

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.

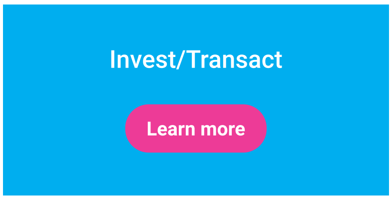
"My Portfolio" is the result and output of the Supervision teams commitment to real time administration and bookkeeping. Please be aware however that if an account or asset can't be updated automatically with data feeds, your portfolio will not be updated a often as it could be.

Messages

Tracking requests for information via emails is very difficult for you and for us. Messages in Class (our preferred accounting software supplier) records and stores all messages between us and our customers. You can attach documents straight to the app and know that it is recorded and saved for your SMSF. This feature is also available on mobile.

Invest & Transact to Create

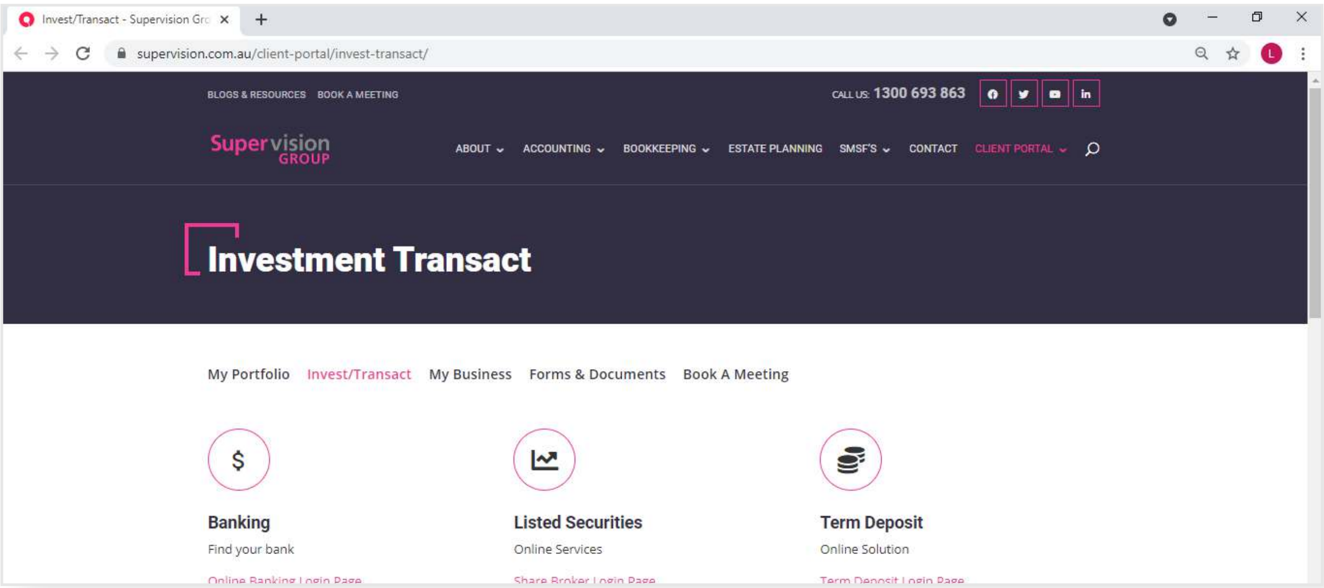
Invest & Transact is to create the transactions to build your financial future. Click on this page to start banking, buying and selling shares, term deposits and viewing your managed portfolio.



Click Here

When you click on this link, you will enter a screen where you can complete investment transactions. This is the working side of your SMSF, Family Trust or Business Investment accounts. From this screen you will be able to login to complete the following transactions:

- Banking
- Listed Securities Purchases & Sales
- Term Deposit Placement
- Managed Portfolio's (if required)
- Access to Insurance (if required)



"Invest & Transact" - What you need to know

Passwords

Supervision does not hold any of your account passwords, nor do we have the ability to trade on your behalf. This is to give you 100% peace of mind that you are in total control over your investment decisions. In addition, you can either reset your password on a regular basis or if you forget, you can reset them without interference. To reset your password select "Forgotten Password".

Compulsory Accounts

As part of our establishment process, Supervision established Bank Account, Share Trading Account & Term Deposit Platform. These accounts are all available through the "Invest & Transact" page which has icons moving your through to the correct pages and links. If you have an account that is not part of our third party supplier list, it may not be available.

Connected Accounts

You will notice that your Share Trading account and Term Deposit platform will be linked to your central bank account. This has been created for your convenience, removing the need to shift money from one account to the next. Once trades are settled, our connected accounts will clear the settled amounts. For example, if you buy a listed share and the settlement day arrives, payment will automatically be withdrawn from the cash account. When you sell a share and the money is available, it will automatically be sent to your cash account.

Super Portal Is Mobile

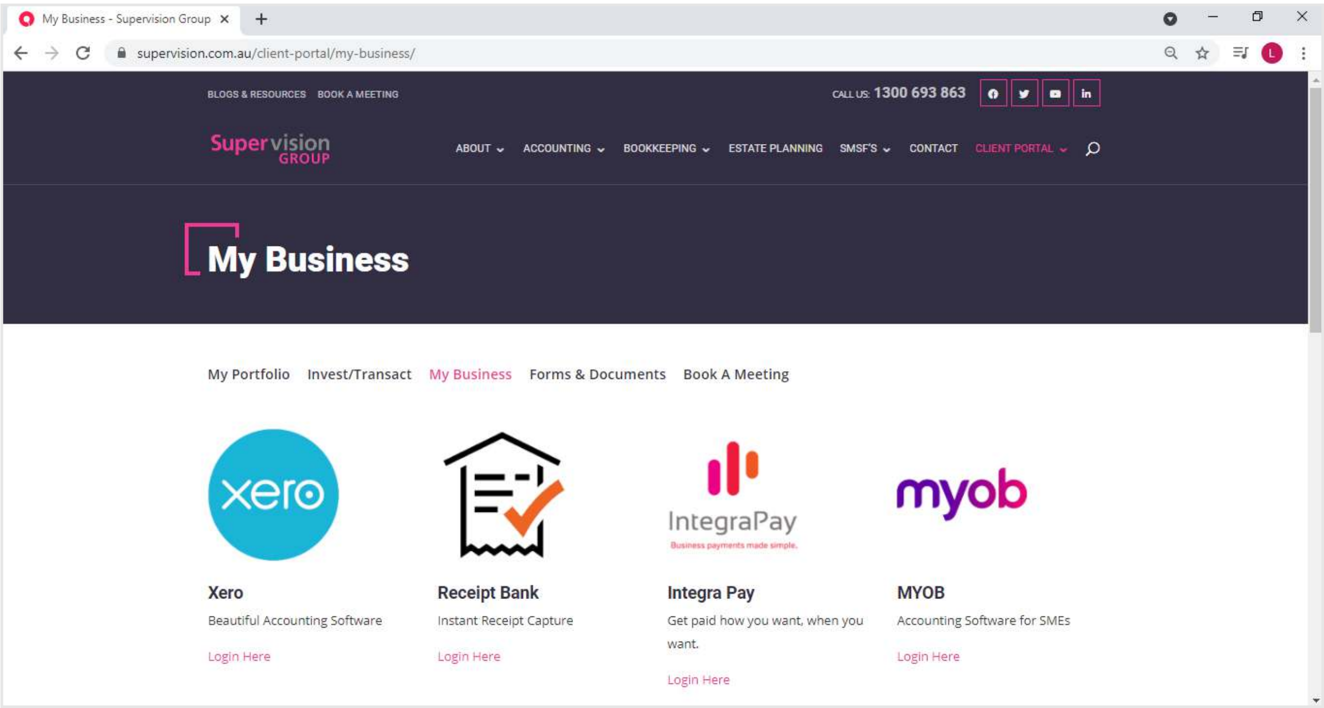
You will be able to reach Super Portal on any device. Whilst some displays will be better on a larger screen, you will be able to use Super Portal on your mobile or tablet device.

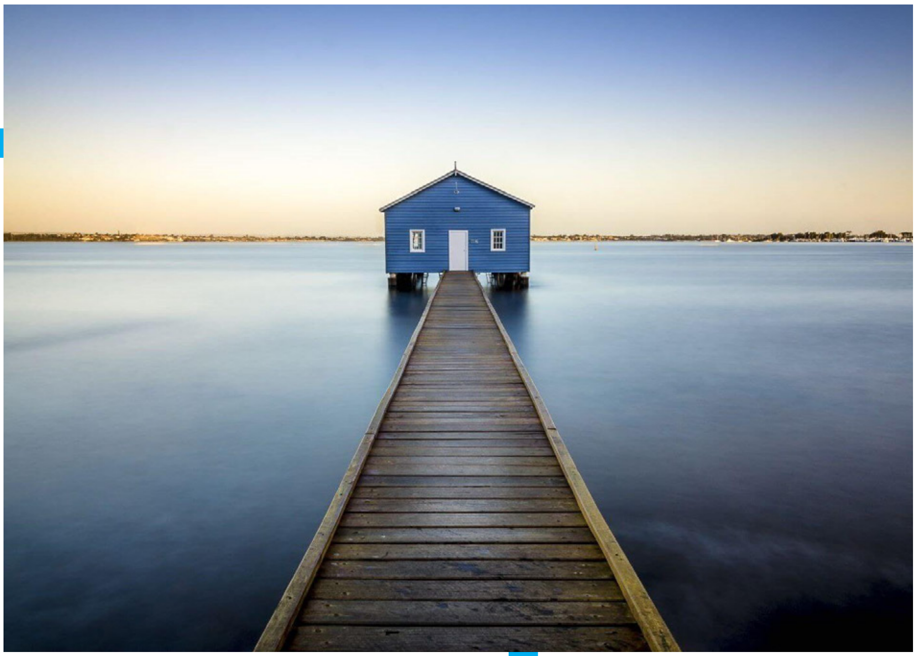
My Business

Learn more

Click Here

"My Business" is where you can access your business related accounting software. Xero and MYOB online are our preferred suppliers of specialist Small to Medium Enterprise business accounting software. We have chosen these two because of their capability to supply our clients with the latest and best accounting and bookkeeping solutions.





SMSF in one PLACE

Why Use Super Portal?

ALL YOUR SMSF INFORMATION IN ONE PLACE

You may be wondering why you should use Super Portal for your SMSF.

We believe that logging into your portfolio to track your Superannuation at regular intervals is extremely important. Not only will it give you an up to date view of your portfolio, but it will also prompt you to ask further questions which can lead to better decisions.

Decisions not only about investing but on tax, contributions and pensions which can make huge impacts over time.

We also believe that using our linked accounts through Super Portal will increase your level of satisfaction with your SMSF. Not only can you move between your bank account and share trading platform seamlessly, but all of those accounts will be linked to each other and Supervision's accounting software.

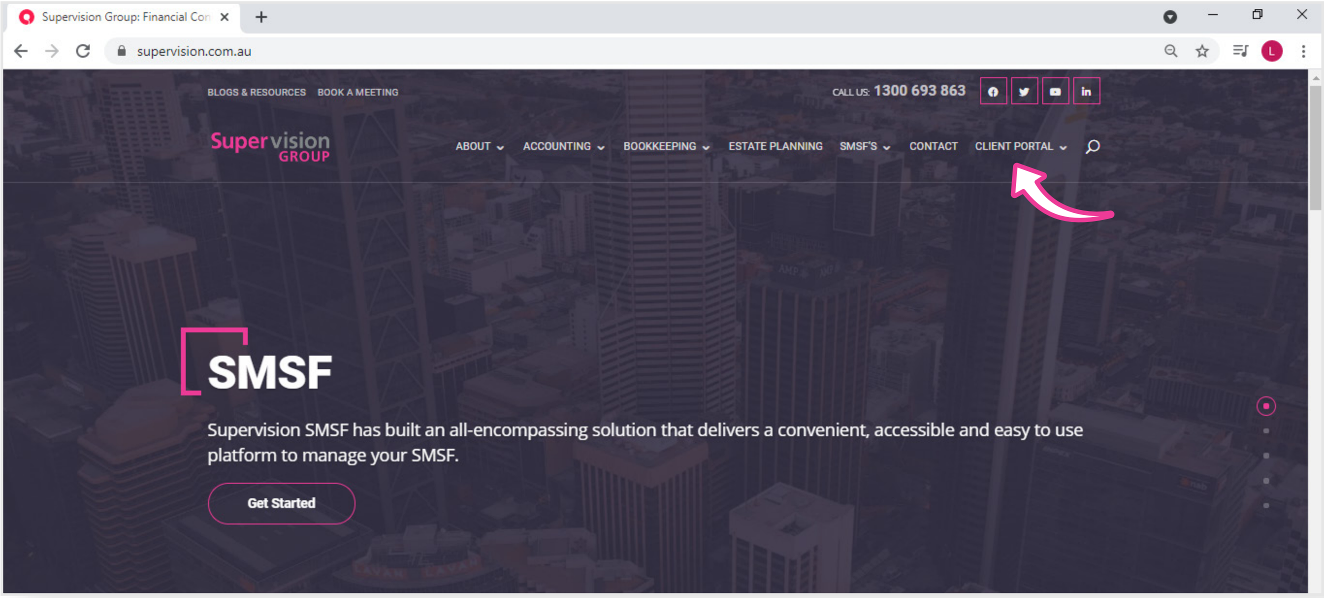
Connected accounts remove the need for you to store paper documents for audit. Supervision is able to upload those documents directly through our read only access. The less time you spend on sorting documents, the more time you can spend on working on building your portfolio.

Super Portal is not about replacing a financial adviser. The purpose of Super Portal is to enhance the client experience by providing up to date information which leads to different conversations with your adviser. You need not spend lots of money on expensive platforms when you use Super Portal.

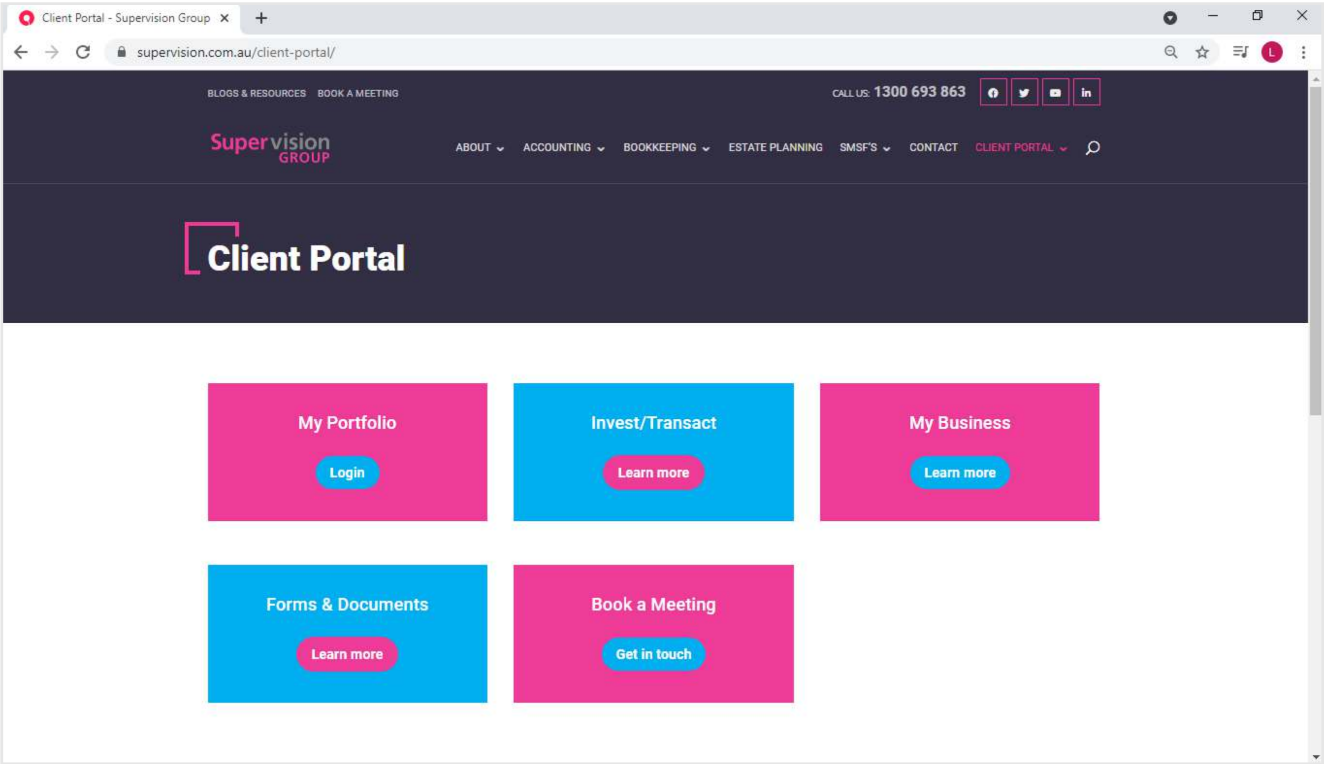
We prefer working with your adviser because usually the advice and subsequent support leads to better financial outcomes.

Where Can I Find Super Portal?

Go to www.supervision.com.au, click “Client Portal”



What Will I See?



Contact Us

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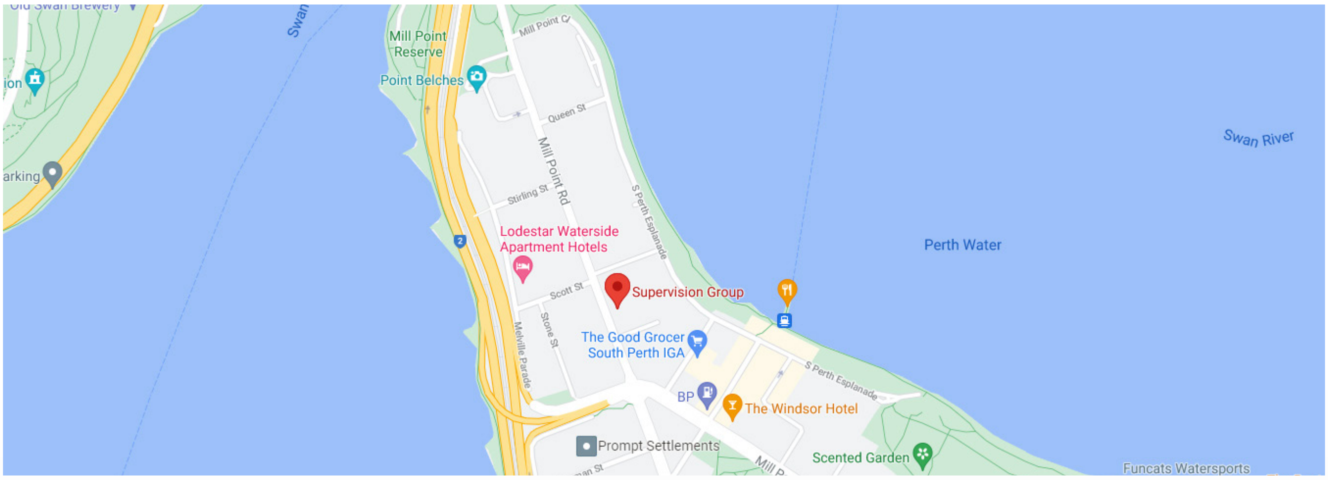

SUPER PORTAL

Print Out Sheet

SUPERVISION ACCOUNTS	USERNAME	PASSWORD
My Portfolio		
Invest / Transact		
Cash Account (ANZ)		
Listed Securities (CMC)		
Term Deposit Provider (AMM)		

OPTIONAL PROVIDERS		
Managed Portfolio		
Share Registries		
HIN Number for Holdings		

Supervision GROUP