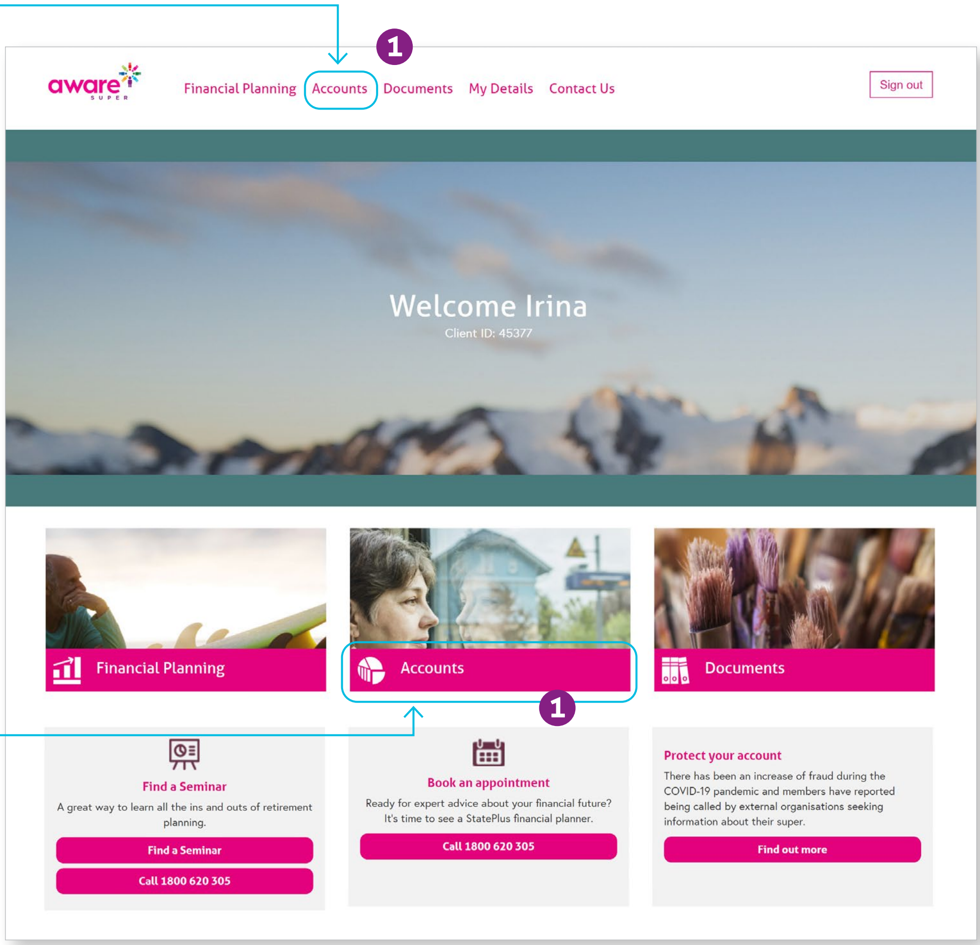
How to generate a Centrelink schedule

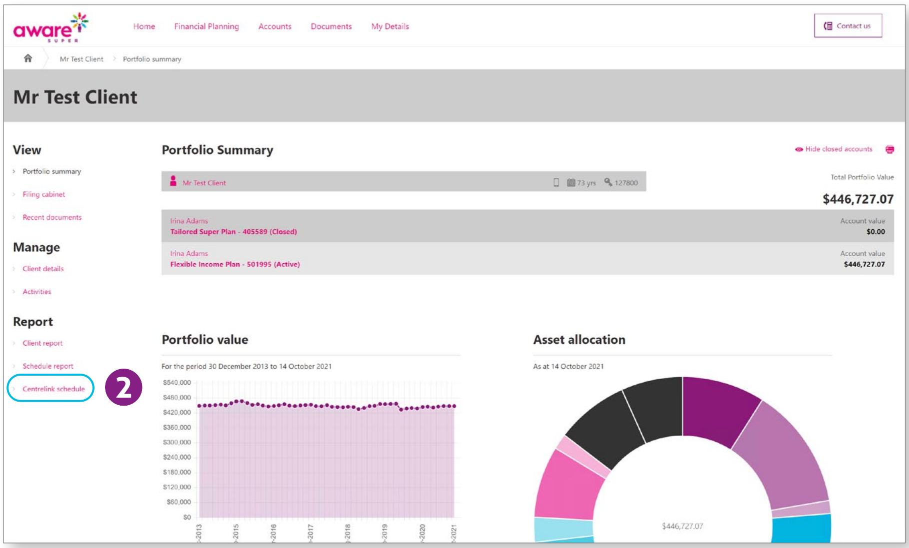
Secure client portal guide | Issued October 2021

The Aware Super secure client portal makes keeping track of your money and investments even easier. You can also easily generate a Centrelink schedule from the client portal. In this guide, we'll show how you to do it.

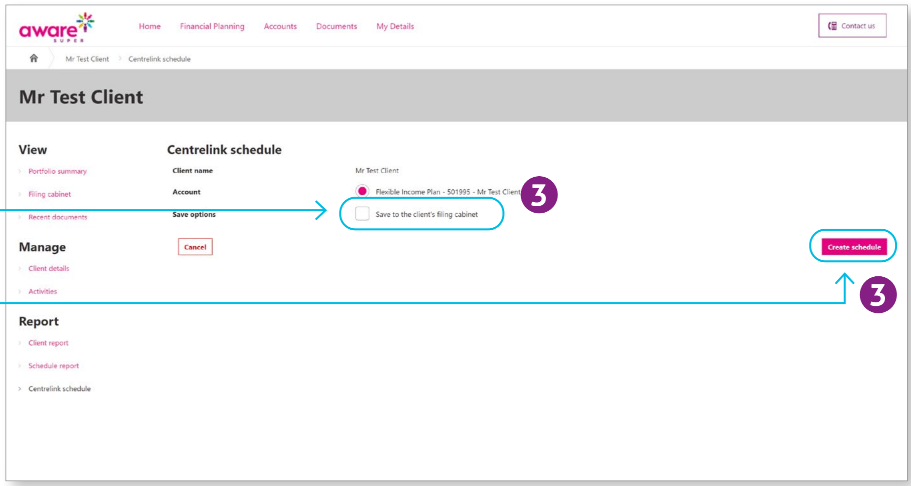


1 After you sign into the secure client portal, select *Accounts*. This can be selected along the top of the screen or from the tiles in the bottom half of the screen as shown.

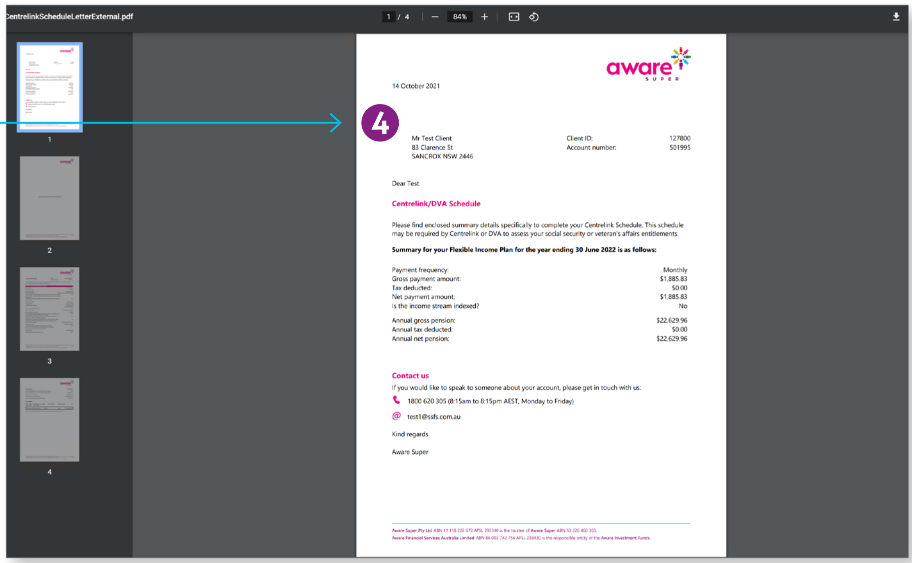
2 Select the *Centrelink schedule* link under the *Report* menu on the left side of the page.



3 Check the account you would like to generate a Centrelink schedule for. On this screen, you also have the option to save your Centrelink schedule to the Filing cabinet by simply checking the tick box next to *Save to the client's filing cabinet*. A copy of the document will now be saved in the Filing cabinet for you to retrieve anytime. Once you're ready, select the *Create schedule* button on the right side of the page.



4 Your Centrelink schedule will appear, ready for you to download or print.



The Aware Super secure client portal makes it easy for you to manage your funds online.

As you can see, the secure client portal makes it even easier for you to manage your funds online when it suits you.

If you ever need help, please speak to your financial planner or contact our Service Centre on **1800 620 305**.

Contact us

Aware Super

Web aware.com.au

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