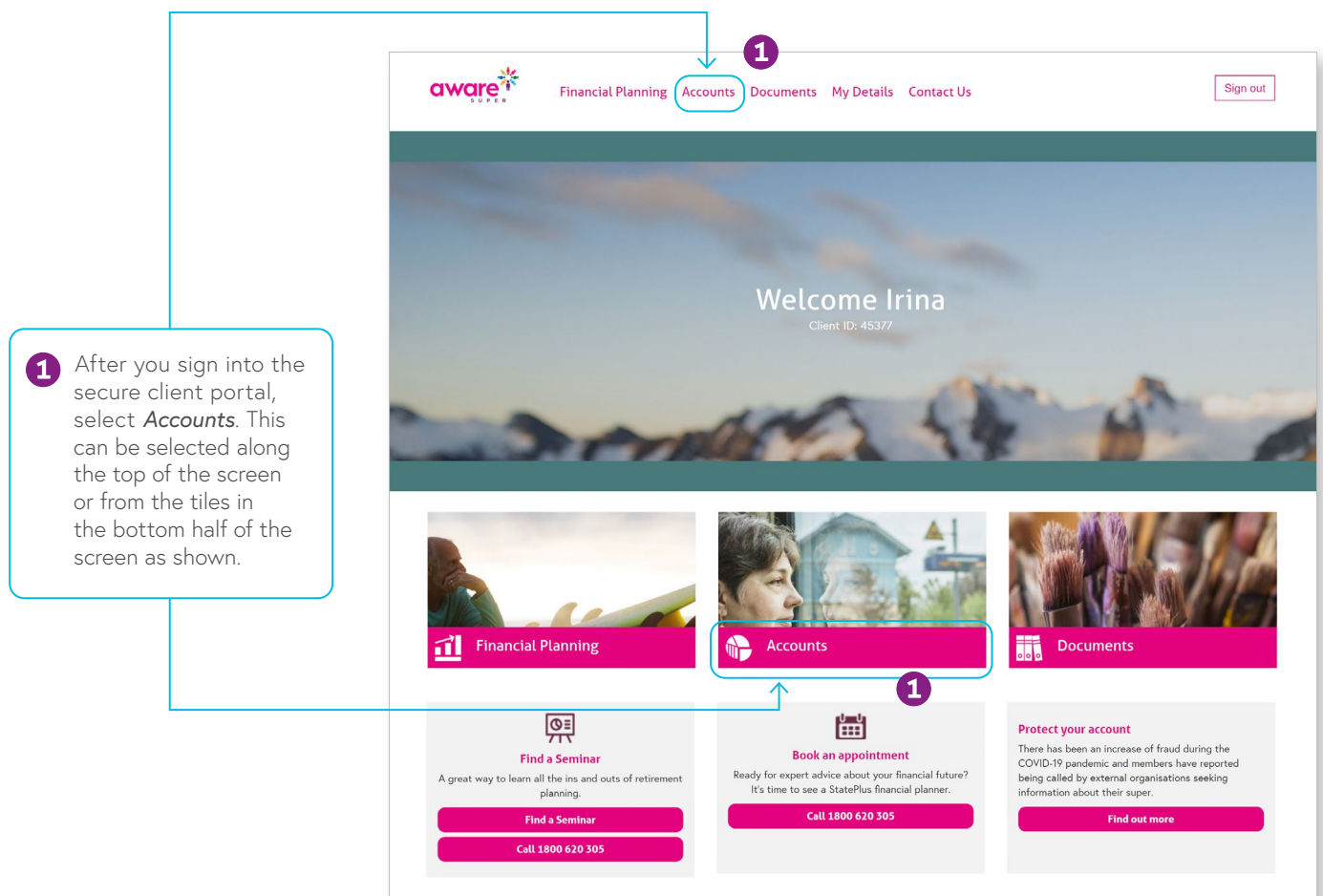


How to navigate the filing cabinet

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 retrieve documentation relating to your accounts from the secure 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.

The screenshot shows the Aware Super secure client portal interface. At the top, there is a navigation bar with the Aware Super logo, menu items for Financial Planning, Accounts, Documents, My Details, and Contact Us, and a Sign out button. Below the navigation bar is a welcome message for Irina (Client ID: 45377). The main content area features three large tiles: Financial Planning, Accounts, and Documents. The Accounts tile is highlighted with a callout box and a '1' in a circle. Below these tiles are three smaller sections: Find a Seminar, Book an appointment, and Protect your account. The Accounts tile is also highlighted with a '1' in a circle.

2 Select the *Filing cabinet*, link under the *View* menu on the left side of the page.

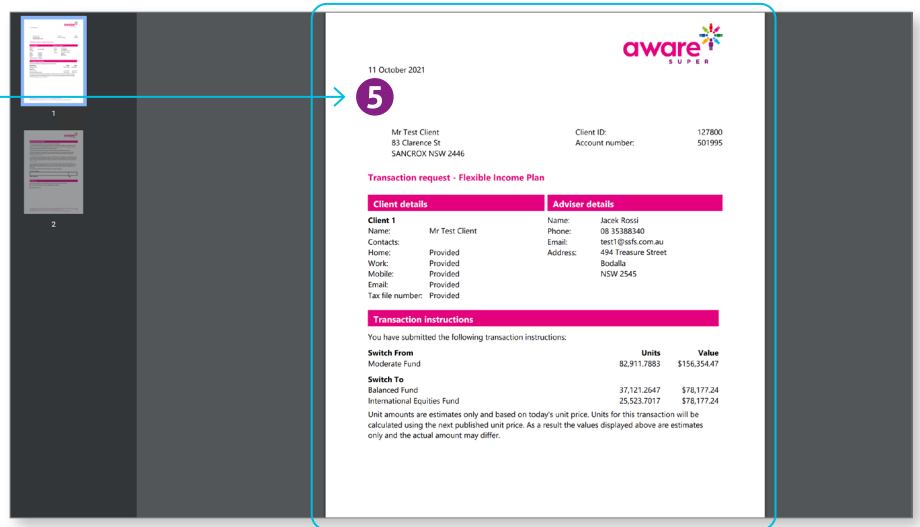
3 Select the account for which you'd like to see transactions, reports and correspondence.

4 Once the account is selected all related documentation will be displayed. To open a document you're interested in, click on the link under the *Documentation* heading in the tables.

Account Name	Description	Status	Created	Adviser	Documentation
501995 - Inira Adams	Switch Transaction	Approved	11/10/2021	Rossi, Jack	4681158 - Transaction request
501995 - Inira Adams	Switch Transaction	Approved	8/10/2021	Rossi, Jack	4681147 - Transaction request
501995 - Inira Adams	Payment Maintenance	CLOSED	28/09/2020	Rossi, Jack	3172041 - Account details - authorisation

Account Name	Description	Status	Created	Adviser	Documentation
501995 - Inira Adams	Generated Report	CLOSED	10/04/2021	Rossi, Jack	4480132 - Sample pdf
501995 - Inira Adams	Generated Report	CLOSED	3/10/2020	Rossi, Jack	3854294 - Sample pdf
501995 - Inira Adams	Generated Report	CLOSED	29/02/2020	Rossi, Jack	3202185 - Sample pdf
501995 - Inira Adams	Generated Report	CLOSED	31/08/2019	Rossi, Jack	2642160 - Sample pdf
501995 - Inira Adams	Generated Report	CLOSED	23/02/2019	Rossi, Jack	1999349 - Sample pdf
501995 - Inira Adams	Generated Report	CLOSED	3/11/2018	Rossi, Jack	1618097 - Sample pdf

5 The document will now be displayed for you to review, 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

Phone 1800 620 305



General advice

Personal advice requires the provider to act in the client's best interests and take into account the client's circumstances. These rules do not apply to general advice. This communication contains general advice only and no personal advice. We have not taken into consideration any of your objectives, financial situation or needs or any information we hold about you when providing this general advice. Further this communication does not contain, and should not be read as containing, any recommendations to you in relation to your product. Before taking any action, you should consider whether the general advice contained in this communication is appropriate to you having regard to your circumstances and needs, and seek appropriate professional advice if you think you need it. Contact us to make an appointment to see one of our representatives. You should also read our product disclosure statement before making a decision about Aware Super. Call us or visit our website for a copy. Issued by Aware Super Pty Ltd ABN 11 118 202 672, AFSL 293340, the trustee of Aware Super ABN 53 226 460 365. Financial planning services are provided by our wholly owned financial planning business Aware Financial Services Australia Limited, ABN 86 003 742 756, AFSL No. 238430. You should read their Financial Services Guide before making a decision.