



AMG
SUPER

Frequently Asked Questions Guide

Acclaim *Super & Pension*

Contents

What is Acclaim Super?.....	3
Is there a New PDS and AIB?.....	3
Go live date – Acclaim Super launch date	3
What will happen to the current AMG Personal Super product?	3
Why do I have two logins?.....	3
When will I get my new login?.....	3
How does family fee aggregation work?	4
Is there new pricing?.....	4
What happens to AMG Super product account applications that are in progress?.....	4
When can I start preparing client recommendations for Acclaim Super?.....	4
Can I migrate existing AMG Personal Super members from the current system to the new platform?4	
Why wait for data migration?	4
Are there changes to my internal share trading account opening process and HIN sponsorship?	5
Does the way I trade equities change?	5
Where should I go for help and support with the platform?	5
When will commissions be paid from the new platform?.....	5
Are there any changes to the insurance arrangements?.....	5
Are data feeds available on the new platform?	5
Is there new USI and ABN information?	5
Do my points of contact change?	6
How can I apply for insurance for my clients in the new Acclaim product?.....	6
An existing AMG Personal super client wishes to transfer their funds to an AMG Personal Pension, can they?.....	6
Where can I locate forms for the new product?	6
What kind of transactions can I make through the new portal?.....	6
Have your ID requirements changed?	6

What is Acclaim Super?

Acclaim Super is a new product released to market by AMG. Acclaim Super is a superannuation product that operates like the traditional AMG Personal Super product with single HIN and CHES sponsored shares. However, Acclaim Super delivers innovative technology, a new pricing structure that allows family fee aggregation, and improved business efficiencies and processes for both AMG and our advisers and members.

Is there a New PDS and AIB?

Yes, Acclaim Super is a new product and the PDS and AIB can be accessed via the links below once the product is launched.

PDS: https://amgsuper.com.au/wp-content/uploads/2021/10/2109_Acclaim-Super_PDS.pdf

AIB: https://amgsuper.com.au/wp-content/uploads/2021/10/2109_Acclaim-Super_AIB.pdf

When does Acclaim Super launch?

In October, exact date to be confirmed shortly.

What will happen to the current AMG Personal Super product?

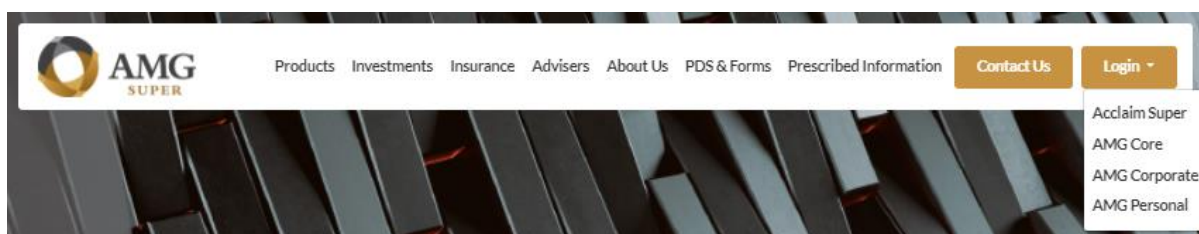
From 30 November 2021, we will no longer be accepting new advised clients in AMG Personal Super & Pension. All new accounts will need to be opened in the new Acclaim Super & Pension product.

AMG Personal Super will remain open to existing clients and will continue to operate as normal. We will migrate the existing AMG Personal Super product across to the new system next year once the data migration project is complete. After migration, these clients will remain in AMG Personal Super. As the Acclaim Super and Pension is a different product with different fees and features, clients will not automatically transfer across. There will be the ability for adviser to switch product via the platform. However, as this is a new product it may require and SOA/ROA.

Why do I have two logins?

Advisers and support staff will have two logins; one to access the old AMG Personal Super platform and one to access the new platform and Acclaim Super. These two logins will be used until your existing client base is migrated into the new platform.

You can access the different product login pages through the AMG Super login drop down menu found on at www.amgsuper.com.au . As per the below:



When will I get my new login?

Prior to the platform launch, as an active adviser on the existing AMG Super platform, you will automatically receive an emailed link inviting you to set up your new Acclaim Super platform login. Once you create your new adviser profile, you will be able to open Acclaim Super accounts when the platform becomes available for use.

Your profile will be setup with the email address, business address and mobile phone number we currently have on record.

How does family fee aggregation work?

Family fee aggregation allows you and members of your family (family group) to combine the account balances of your Acclaim Super and Pension accounts. The administration fees and costs applied to each account within a family group will be calculated based on the combined balance of up to four accounts across the family group.

Family groups can be set up by your financial adviser through AMG Online.

All members of the family group must have the same financial adviser and one of the following relationships to the primary member to be eligible for family grouping:

- Married or de facto spouse
- Parent
- Child
- Sibling
- Grandparent
- Grandchild

Is there new pricing?

Yes, there is new pricing on the new Acclaim Super product. Please reach out to your BDM contact for more information. A full list of applicable fees can be found in the relevant [PDS](#) and [AIB](#).

What happens to AMG Super product account applications that are in progress?

Application forms for the current AMG Super product will continue to be processed until 30 November 2021.

When can I start preparing client recommendations for Acclaim Super?

As an adviser, you will be able to open Acclaim Super & Pension accounts online via the new platform. We will be emailing all advisers prior to go-live with a step-by-step guide of how-to login to your adviser account. You will then be able to create new client accounts via the platform.

However, if you wish to start the process with your clients before getting access to the new platform you can download soft copy application forms as an interim solution and email the completed forms to us. Please contact your AMG Distribution contact for a copy of these forms.

Can I migrate existing AMG Personal Super members from the current system to the new platform?

If you choose to move from AMG Personal Super to Acclaim Super prior to data migration, you can action this step via superannuation rollover. This will trigger the relevant CGT and pension resets as per usual rollover implications.

Why wait for data migration?

Data migration will ensure that all tax parcels, HIN information, trading history and unit pricing for member portfolios will not be affected.

AMG will migrate all existing AMG Personal Super members' account information and history over to the new platform, which will consolidate business functions and improve adviser efficiencies across the board.

Data migration enables us to continue to house any existing AMG Personal Super member accounts inside the new platform but maintain their existing account environment. This means that their existing fees, account type and corresponding PDS will remain AMG Personal Super.

Are there changes to my internal share trading account opening process and HIN sponsorship?

The only change for your internal share account opening processes will be the naming convention used for the designation. The designation will update from <AMG – member name> to <Acclaim – member name>.

The accounts will still be opened in the name of Equity Trustee's Superannuation Limited with the same registered address details. The updated designation will help you to differentiate between the AMG Personal Super accounts and Acclaim Super accounts. It will also ensure we are able to identify the HIN relationships for portfolio reconciliation.

Does the way I trade equities change?

No. You will continue to have choice of broker and trade through your internal platform as usual.

Where should I go for help and support with the platform?

A full catalogue of video tutorials and process guides can be found within the portal under the Support menu.

As always, your AMG Distribution contact or AMG Client Services team are here to provide phone support.

When will commissions be paid from the new platform?

Commissions will continue to be run a month in arrears and paid out to your dealer group before the 10th day of each month.

Are there any changes to insurance arrangements?

You will still have the same flexible insurance arrangements through the new platform. A guide on available insurance options can be found [here](#).

Are data feeds available on the new platform?

Data feeds for Morningstar/Adviser logic and Xplan will be available when the platform becomes available. A tutorial on how to set up a data feed can be found in the portal.

Is there new USI and ABN information?

The ABN for the Fund will remain 30 099 320 583. However, the new Acclaim Super product will have the following USI:

Acclaim Super USI: 30099320583001

Acclaim Pension USI: 30099320583002

Do my points of contact change?

You will still be supported by your usual distribution contact, and normal AMG client services contact details remain the same. There is an added feature in the new platform to securely upload ad-hoc documents and queries that will generate a message to our administration team.

How can I apply for insurance for my clients in the new Acclaim product?

This process remains unchanged. You can apply for clients' insurance via forms or online:

<https://amgsuper-2.snapforms.com.au/form/amg-insurance-application-form> .

An existing AMG Personal Super client wishes to transfer their funds to an AMG Personal Pension, can they?

Yes – Although we are not accepting new business into the AMG Personal product, if you have an existing client already in AMG Personal, they are able to move to pension phase and restart any pensions as needed.

Where can I locate forms for the new product?

Any transactions that can't be actioned through the new portal will have a relevant form located in the Forms section of the portal. For transactions that you perform through the portal, if your client is required to sign a form it will be generated on the submission page for you to download, and an upload box will be visible.

What kind of transactions can I make through the new portal?

The high degree of self-service capability is a big step forward from our existing platform. As advisers you will be able to utilise a whole range of features via your online adviser access, including:

- Opening new client accounts
- Managing cash setting
- Running comprehensive reporting and benchmarking
- Auto-scheduling of reports to clients
- Setting up family fee aggregation
- Setting up access for support staff
- Claiming tax deductions online
- Running Centrelink schedules
- New range of flexible pension payment options
- And much more

Although the new platform technology is intuitive, we also have also put together a complete range of guides and videos to help you or your support staff to understand and utilise the functionality available within the new portal. You will be able to access these guides in AMG Online.

Have your ID requirements changed?

Yes, we have introduced electronic identity verification technology. There are three main options for a client's ID to be verified:

Option 1: A scanned colour copy or photograph of a current primary photographic identification document such as a passport or driver's licence; AND if consent is given proceed with an electronic verification of identity check.

Option 2: An original or certified copy of a current primary photographic identification document, such as a passport or driver's license.

Option 3: An original or certified copy of a current non-photographic identification document such as a birth certificate, citizenship certificate or Centrelink pension or health card; AND

- An original or certified copy of a secondary identification document such as an assessment issued by the ATO to the person within the preceding 12 months that contains the name of the person and his or her residential address; OR
- A rates notice issued to the person within the preceding three months that contains the name of the person and his or her residential address; OR
- A Centrelink letter addressed to the person within the preceding 12 months regarding a government assistance payment.

For any additional information please reach out to your distribution contact:

Terry Constable

Head of Distribution and Partnerships

terry.constable@amgsuper.com.au

P: (07) 3228 2632

M: 0410 117 629

Peter Clifford

Business Development Manager

peter.clifford@amgsuper.com.au

P: (07) 3228 2642

M: 0499 606 067

Jennifer McGee

Business Development Associate

jennifer.mcgee@amgsuper.com.au

P: (07) 3228 2656