

Praemium SMA & Super SMA

Request	Authority		Lodgement			Required Form	Notes
	Investor	Adviser	Email	Praemium online	Phone		
<i>New business - new account</i>							
SMA Individual	●			●			Applications are to be submitted online with a signed copy of the application emailed to applications@praemium.com.au Where the adviser has not verified the identification of the investors the Investor Identification form is required in addition to the application
SMA Joint	●			●			
SMA SMSF Individual	●			●			
SMA SMSF Corporate	●			●			
SMA Trust Individual	●			●			
SMA Trust Corporate	●			●			
SMA Company	●			●			
SuperSMA Accumulation	●			●			
SuperSMA Pension ABP	●			●			
SuperSMA Pension - TTR	●			●			
<i>Update account details</i>							
Name change	●		●			Change of personal details form	Investor to provide certified ID or marriage certificate
Update DOB	●		●				
Address change		●		●			
Update email address		●		●			
Update adviser fees		●		●			
Update TFN		●		●			
Update beneficiary non-binding (SuperSMA only)	●		●			Non-Binding nomination of beneficiary form	Form completed and emailed to support@praemium.com.au

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Update account details							
Update beneficiary binding (SuperSMA only)	●		●				Binding nomination of beneficiary form Form completed and emailed to support@praemium.com.au
Change bank account	●		●				Instructions to change or add bank account Form to be signed by the client and emailed to Praemium
Change of adviser	●		●				Request to change nominated representative form Form to be signed by the client and emailed to Praemium
Change account value							
Cash in (SMA only)		●		●			Where valid bank account details are on file, the instruction can come from the adviser. Otherwise a bank account request is required from the investor
Partial withdrawal (SMA only)		●		●			
Full withdrawal (SMA only)		●		●			
Update regular withdrawal (SMA only)		●		●			
Inspecie transfer in (SMA only)	●			●			Inspecie transfer request form is populated online Refer to the inspecie transfer process document for further information
Inspecie transfer out (SMA only)	●			●			
Employer contribution (SuperSMA only)			●				Employer contribution form All employer contributions must be made via SuperStream. Employer contribution form to be lodged with the employer
Member contribution (SuperSMA only)	●		●				Member contribution notification form
Partial withdrawal (SuperSMA)	●		●				Payment request form and ID Or super stream message from rollover fund
Full withdrawal (SuperSMA)	●			●			Payment request form and ID
Update models		●		●			
Update regular contribution		●		●			Where valid bank account details are on file, the instruction can come from the adviser. Otherwise a bank account request is required from the investor.

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Change income payments (SuperSMA only)		●		●			Where valid bank account details are on file, the instruction can come from the adviser. Otherwise a bank account request is required from the investor
Rollover in (SuperSMA only)		●		●		Easy transfer form	Or via incoming super streaming fund
Rollover out (SuperSMA only)	●		●			Payment request form and ID	Or via incoming super streaming fund
TFN declaration (pension members under 60)	●		●			ATO TFN declaration form	
Notice of Intent to Claim (self employed members) (S290)	●		●			Notice of intent to claim form (S290)	
User Maintenance							
Change user level		●		●			
Set up new user (internal)		●		●			
Activate Investor Portal		●		●			
Praemium							
New Adviser		●	●			New adviser request e-form	
Change Adviser code		●	●			Instructions to change Dealer Group or PDS	
Change Dealer group		●	●			Instructions to change Dealer Group or PDS	
Change PDS		●	●			Instructions to change Dealer Group or PDS	
Remove client		●	●				Request to remove client. New adviser instructions will be sought from the investor if not provided at the time of request

T 1800 571 881

E support@praemium.com.au

W www.praemium.com.au

