FOR ADVISER USE ONLY

MLC AdviserOnline

Quick reference guide

March 2021

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What you'll find in this guide

Get started

Logging on

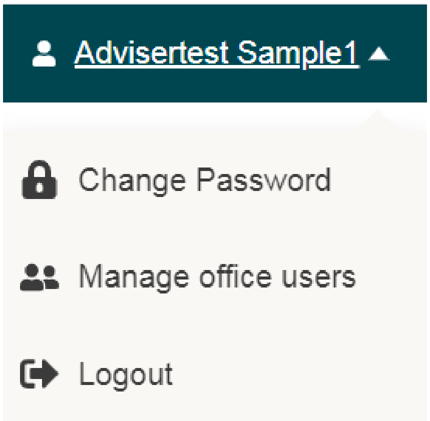
1. Go to **mlc.com.au** and click **Login**.
2. Enter your username and password and click **Login now**.
3. You'll be taken to your MLC AdviserOnline desktop. When your clients login following the same steps above, they'll be taken to their portfolio.

If you or your client have forgotten your password, you can reset it online by visiting **mlc.com.au/login** and clicking **Forgot your password?**

Changing your password

You should change your password regularly, and immediately if you think someone knows it.

When you change your password, it will apply to all of your adviser login details.



4. Click the **Options** button, located near the top right of the page and select **Change password**.
5. Enter your current password.
6. Enter and confirm your new password.
7. Click **Change password**.

Logging off

To exit the secure site of mlc.com.au you need to click on the **Options** button, located near top right of the page and select **Logout**.

Help centre

The Help centre lets you and your clients to search for answers to frequently asked questions. You can also rate the answers we provide to your questions.

Your adviser desktop

1. Navigation tabs

Move quickly and easily to the section you need.

2. Reports

Generate an extensive range of reports on your clients.

3. My business

Manage your business using our reports, client data exchange service and update your details.

4. Change password

5. Search

Type your client's name into the search bar, or use the search filters to access an extensive range of search options.

6. Apply online

Setup your client's MLC MasterKey or MLC Insurance products here.

7. Work tracker

Displays transactions and interactions for all your clients. This includes the status of applications and transaction progress.

8. Online transactions

Displays submitted online transactions, including client-initiated transactions.

9. Upload documents

Efficiently upload and submit documents to us online.

10. Client leads

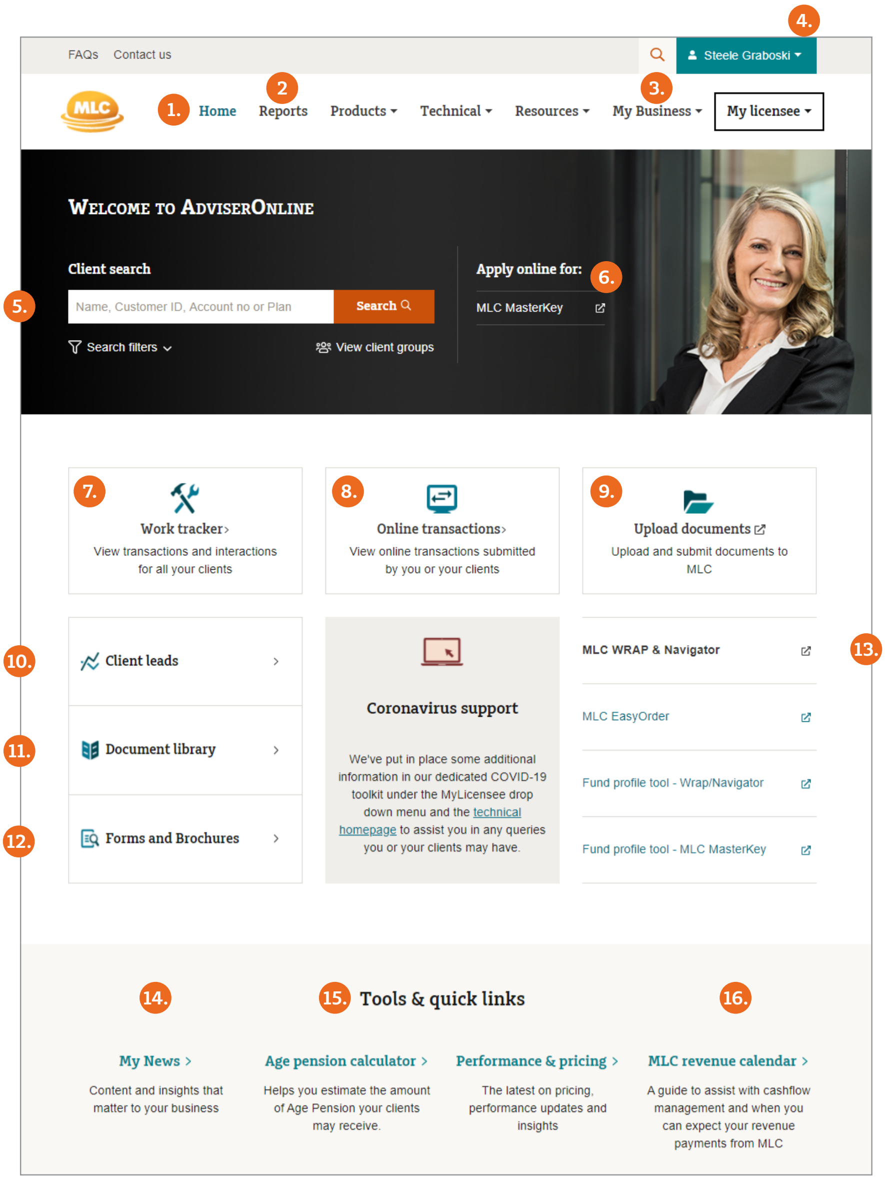
Displays your five most recent leads.

11. Document library

Access important information about your MLC MasterKey and MLC Insurance clients.

12. Forms & brochures

Find all our forms and brochures in one place.



13. MLC Wrap super solutions

Access general information on your client's MLC Wrap and Navigator products.

14. My News

Easy to read content and insights that matter to your business.

15. Age pension calculator

A quick link to Age pension calculator.

16. MLC Revenue calendar

Searching for clients

1. Client search

- Go to your Home page.
- Enter client details in **Client search**.
- Your search results will display.

Search results will only display if there's more than one result. If there's only one result, you'll be taken to either your Client's profile or Plan profile page.

2. Search filters

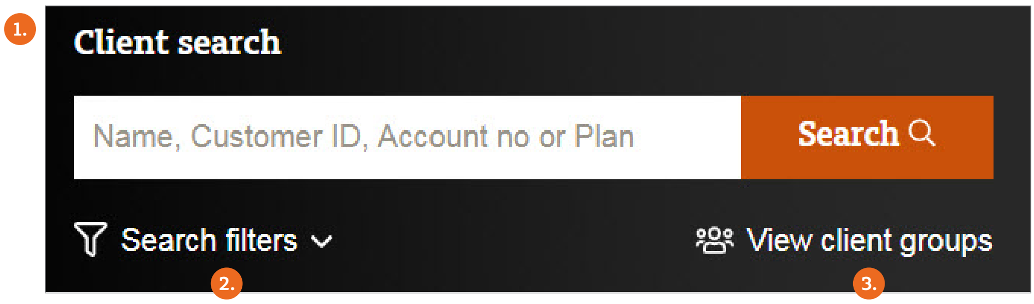
You can also use search filters to refine your search.

3. View client groups

- To access **Client groups,** select **View client groups**. This will open the My group clients screen.
- **Client groups** lets you create reports for multiple clients or groups of clients in pdf or spreadsheet formats.

4. Recent clients menu

You can quickly access the last five clients or business super plans you viewed by clicking on the **search bar**.



Client activities

Work tracker

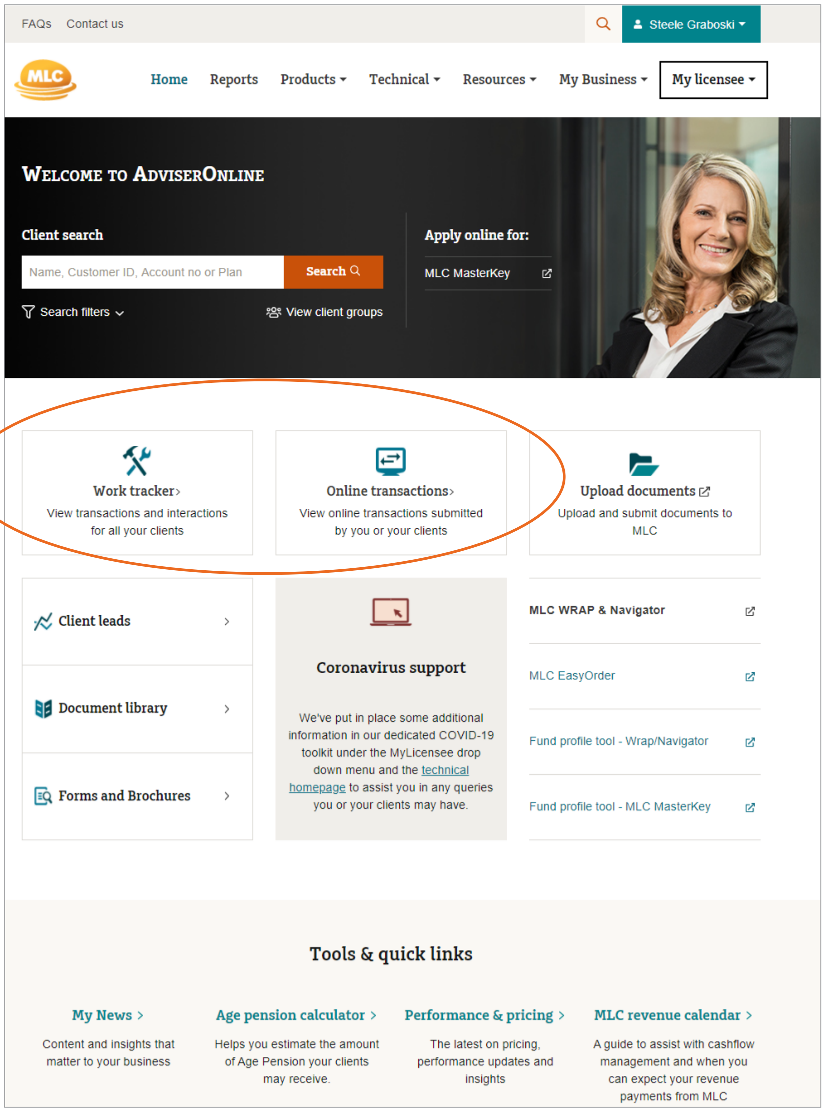
My Work Tracker lets you view and track the progress of requests that have been sent to MLC for your clients. Comprehensive updates are available daily on the progress of your clients requests, including:

- New business applications;
- Account enquiries;
- Investment switches; and
- Withdrawals.

Online transactions

My transactions, which is launched by clicking **Online transactions**, displays all transactions submitted online.

Transactions submitted by you, your clients and tasks processed by us are all displayed. You can see drafts, scheduled, submitted and cancelled requests. You can also view and delete pdfs of transactions.



Reports

Reports

Access our professional, detailed and easy to customise reports for individuals and group clients.

Click **Reports** followed by **New report** to generate a report for your client(s). Search for your client, select the report type, then a date range and click **Confirm**. Alternatively, you can also access reports for specific clients by clicking on **Portfolio review** from your client's profile.

Reports will be available to view online for 7 days.

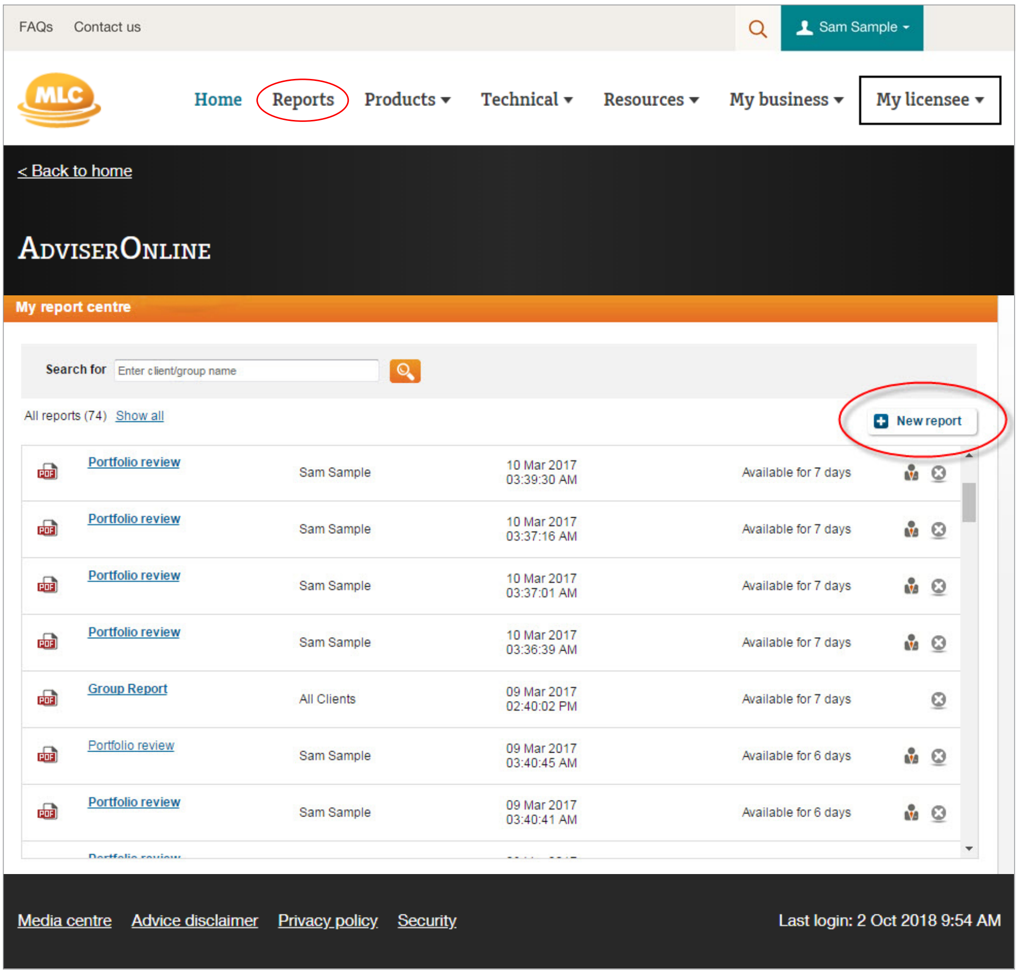
Adviser Documents Online

To access important information about your MLC MasterKey, Business Super clients, click **Document library**.

Client specific reports

On the **Client** portfolio page, you can view client specific reports under **Reports** on the right panel. This shows up to five reports run in the last seven days.

You can access the Portfolio review and Portfolio snapshot report for your client.



Your client's profile

1. Portfolio snapshot report

Open a detailed view of a client's account as a PDF.

2. Portfolio review

Generate reports for your client's portfolio.

3. New MLC MasterKey account

Setup a new MLC MasterKey account for your client.

4. Online transactions

Displays your client's submitted, draft, scheduled and canceled online transactions.

5. Client details

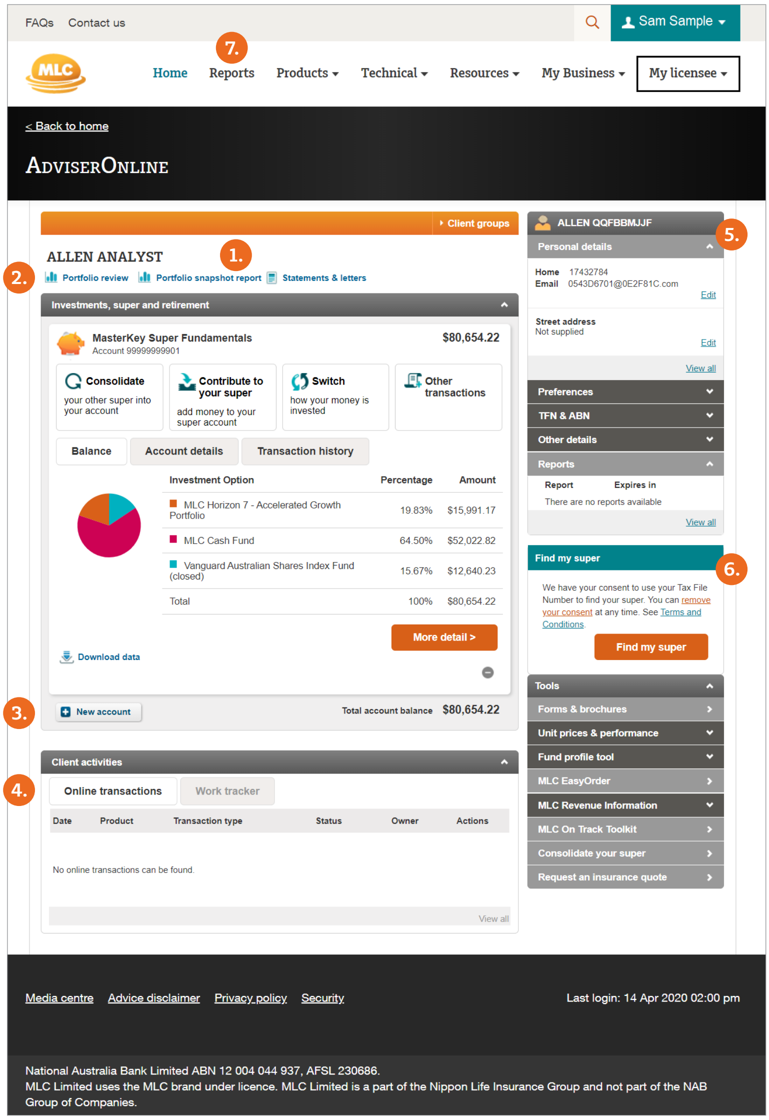
View and update your client's contact details.

6. Find my super

Search and consolidate your client's other super to MLC.

7. Reports

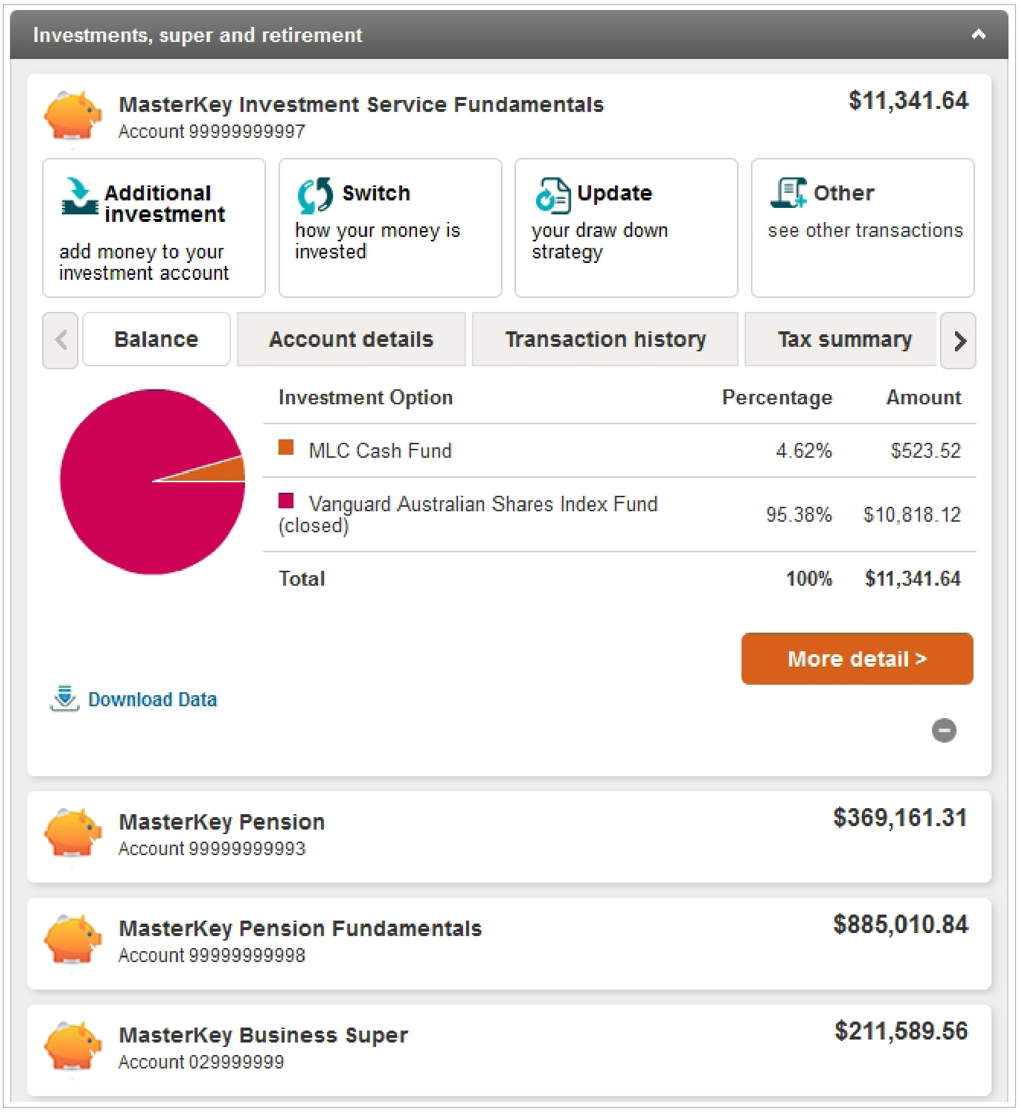
View your client's most recently generated reports.



Your client's profile in more detail

Your client's profile displays all of their accounts; investments, super and retirement.

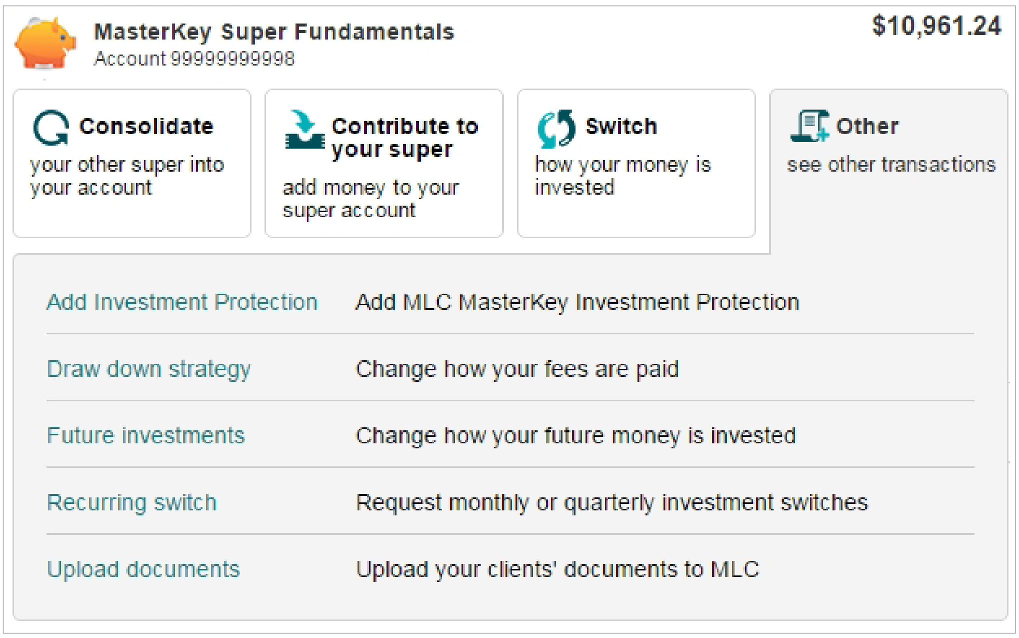
Click on their account to view more details, including their account/ policy details, balance by investments, transactions and insurance benefits.



Transacting on your client's account

Clicking on your client's account or policy will reveal a list of available transactions and requests that you can submit to MLC. The transactions displayed are applicable to the product and include:

- Super consolidation - Manually enter the details of the super fund as the ATO search function is not available to advisers
- Additional contributions and investments
- Investment switching
- Updating draw down strategy
- Pension payment



Updating your client's contact details

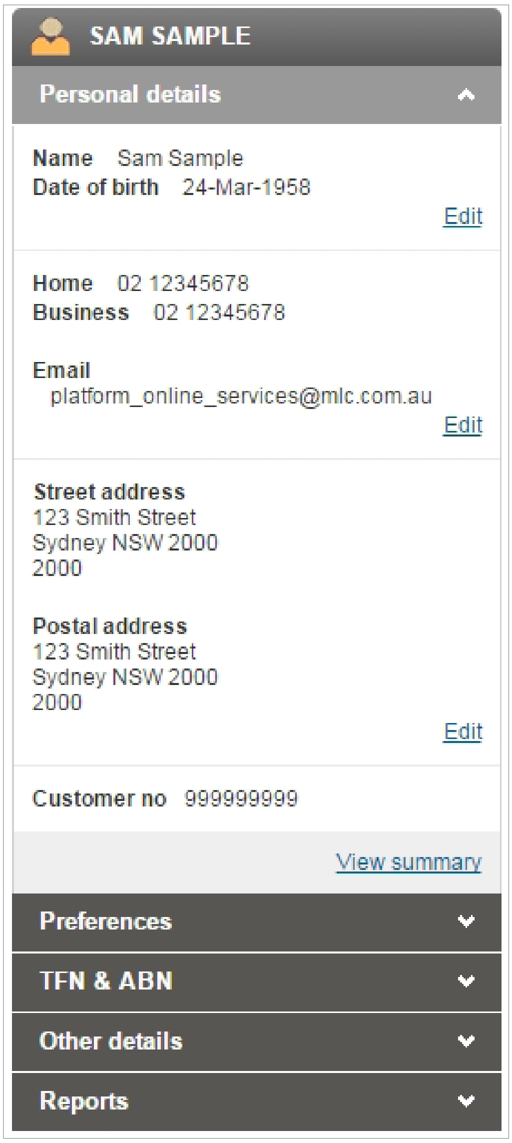
Your client's contact details can be viewed and updated in the right hand side panel of their client profile.

As an adviser, you can update your client's:

- Name and date of birth
- Phone numbers
- Email address
- Street and postal addresses
- Foreign residency for tax purposes (investment customers only)
- Occupation type

In addition, you can view, but not update your client's:

- Statement delivery preference
- Tax File Number



Icon glossary

	**Investment, Superannuation and Pension** Within each of these categories the products will be displayed in alphabetical order. Closed accounts will be displayed at the bottom of the category. You'll only be able to see accounts you service. The total account balance is the sum of only the displayed accounts. Any account you no longer service will be removed from the section. Accounts available to view online include: MLC MasterKey Super / Fundamentals, MLC MasterKey Pension / Fundamentals, MLC MasterKey Investment Service / Fundamentals, MLC MasterKey Unit Trust, MLC MasterKey Business Super, MLC MasterKey Personal Super, MLC MasterKey Rollover, MLC MasterKey Superannuation Gold Star (non-TUSS) (SMSFs), MLC MasterKey Investment Bonds, MLC MasterKey Superannuation, MLC MasterKey Allocated Pension, MLC MasterKey Term Allocated Pension, and MLC MasterKey Annuity.
	Joint accounts will be displayed using this icon beside the product name.
	Indicates your client submitted an online request.
	Indicates you submitted an online request.
	Indicates we cancelled an online request.

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