



ONLINE APPLICATIONS REFERENCE GUIDE

Getting your advice working sooner



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INTRODUCTION TO ONLINE APPLICATIONS

Online applications is a service that lets you complete and submit new business applications for super, pension and investment products to us securely online.

How it works

Applications are completed online and then submitted to us electronically. In most cases, we can set up your clients accounts immediately. And, if you've included a valid email address for your client, they'll be automatically registered for secure access to **mlc.com.au**

We'll then send them a Welcome email with the details of how they can get immediate access to personal details and account information. This will be followed by a Welcome kit sent by mail.

The benefits of online applications

Faster turnaround on new business – Applications take minutes to complete and once submitted, your clients will have immediate access to their accounts online. We'll send them a Welcome email (if a valid email address has been provided) the next business day followed by a Welcome kit.

Better service – Your clients will have their accounts setup as soon as the online application is submitted. They'll also have the added comfort of knowing their investment strategy is working for them straight away.

Convenience – Online applications can be saved as a draft, letting you partially complete applications before meeting with clients. Best of all, you can submit online applications at anytime and manage your workload to suit your needs.

Saves you time – Online applications are intuitive and provide helpful prompts to identify any information you may have missed, avoiding rework later. You'll save time as the questions are dynamic, meaning that they'll only be asked if required. Also, if your clients are already in the system, the online application will automatically populate their details.

Products available for online applications

Online applications can be used to apply for the following products:

- MLC MasterKey Super
- MLC MasterKey Super Fundamentals
- MLC MasterKey Pension
- MLC MasterKey Pension Fundamentals
- MLC MasterKey Investment Service
- MLC MasterKey Investment Service Fundamentals
- Transfer to Fundamentals (available for MLC MasterKey Super and MLC MasterKey Pension).

COMPLETING AN ONLINE APPLICATION

The following pages in this guide describe the process to submit an online application to us.

Logging into MLC AdviserOnline

Go to mlc.com.au and click **Login now**.

Enter your username and password and click **Login**.

Don't have secure access to mlc.com.au?

Register here to create an account.

Forgotten your password?

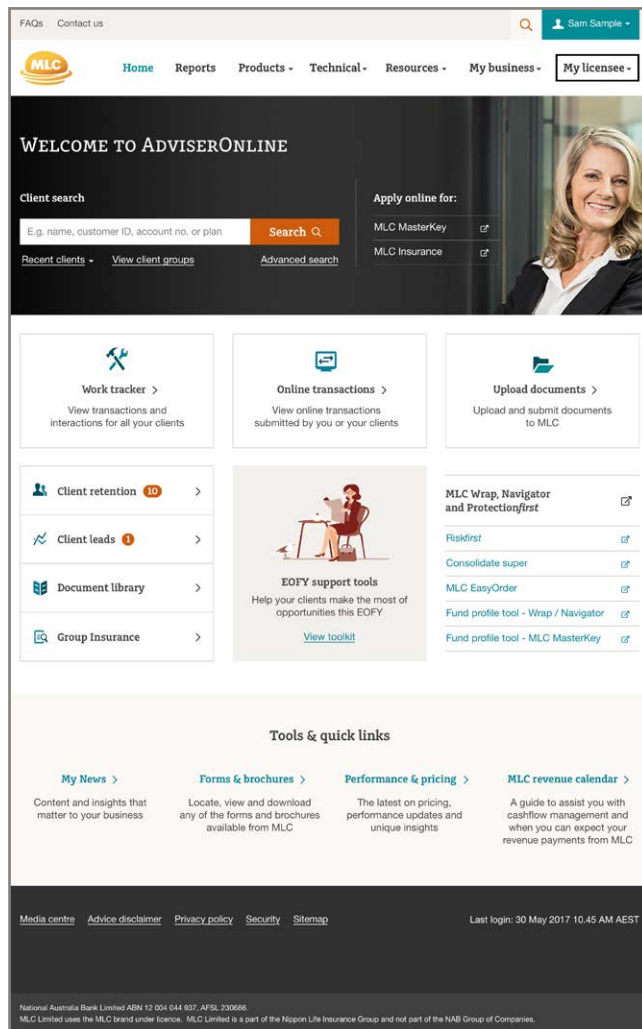
If you've forgotten your password, you can reset it online by visiting mlc.com.au/login and clicking **Forgot your password?**

The screenshot displays the MLC AdviserOnline website. At the top, there is a navigation bar with links for Home, About MLC, FAQs, and Contact us. Below this, a secondary navigation bar includes links for Personal, Adviser (highlighted), and Business. A search icon is also present. The main content area features the MLC logo and a list of services: Super, Learn about MLC, Investments, Retirement, and Insurance. A large banner for 'RG 97' is visible, with the text 'Understanding the new fee and cost disclosure requirements' and a 'Find out more' button. On the right side, there is a 'Login to MLC' section with fields for Username (with a hint 'Eg Email, customer no, investor ID') and Password, a 'Login now' button, and links for 'Forgot your password?' and 'Login help'. A sidebar on the right contains links for Login, Contact us, Investment insights, Prices & performance, and Forms & documents. At the bottom, there are two sections: 'MLC Easy order' with a shopping cart icon and 'Partnering with us' with a handshake icon.

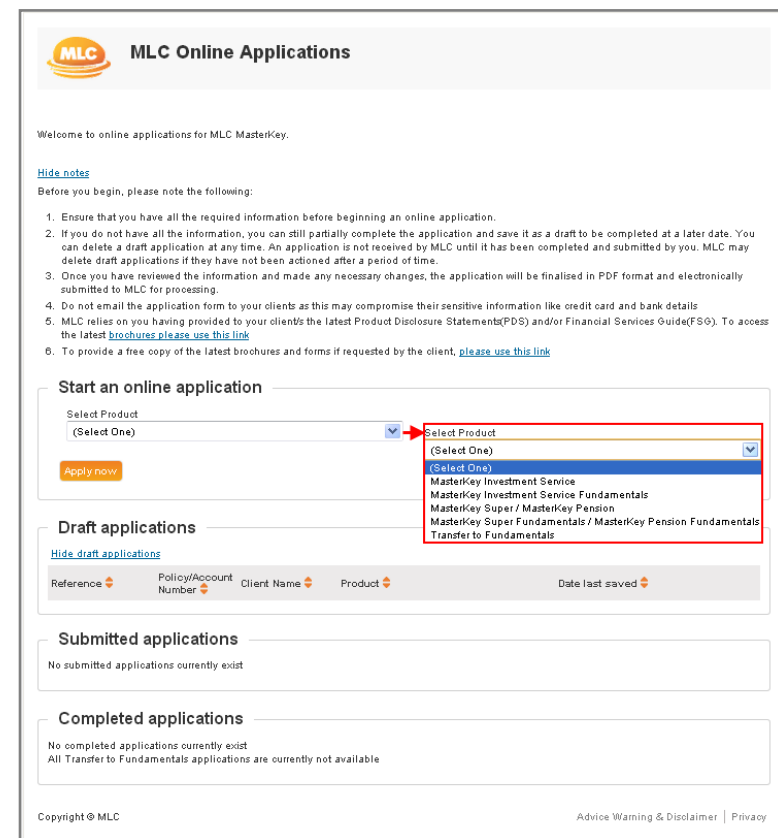
COMPLETING AN ONLINE APPLICATION

Accessing the online application homepage

1. From the MLC AdviserOnline homepage, click **Apply online** and then click **MLC MasterKey**



2. Select the product from the drop down menu and click **Apply now**.



COMPLETING AN ONLINE APPLICATION

Starting a super or pension online application

3. If you've chosen a super or pension product from the drop down menu, you'll be asked to select super or pension and then click **Apply now**.

Start an online application

Select Product
MasterKey Super Fundamentals / MasterKey Pension Fundame

To complete both a Super and Pension application, this is a two step process:

1. Complete a Super application online, and
2. Complete a Pension application online.

Please select the type of application required*

☐ Super

☐ Pension

Apply now

4. Click **Add Applicant**.

MLC MasterKey Super Fundamentals

1 Applicant details 2 Investments 3 Investment facilities 4 Investment strategy 5 Beneficiary nomination
6 Other information 7 Adviser details 8 Identification 9 Attachments 10 Review 11 Submitted

* Indicates required field

Cancel Save As Draft Validate Page **Next >**

Applicant details

Type of Applicant
UNKNOWN **Add Applicant**

Cancel Save As Draft Validate Page **Next >**

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COMPLETING AN ONLINE APPLICATION

Starting an investment online application

5. If you've chosen an investment product from the drop down menu, you'll be asked to select the type of account you'll be opening for your client after you've clicked **Apply now**.

The screenshot shows the 'MLC MasterKey Investment Service Fundamentals' online application form. At the top, there is a progress bar with eight steps: 1. Applicant details (active), 2. Investment facilities, 3. Investment strategy, 4. Other information, 5. Adviser details, 6. Attachments, 7. Review, and 8. Submitted. Below the progress bar, there is a legend indicating that an asterisk (*) denotes a required field. The main form area contains a question: 'What type of account are you opening?'. Below this question is a dropdown menu labeled 'Account Type*' with a list of options: (select one), (select one), Individual, Joint, Partnership, Trust, Trust (for Minors), Superannuation Fund, Company, and Other. The dropdown menu is currently open, showing the first two options. To the right of the dropdown menu is a 'Next >' button. At the bottom of the form, there are links for 'Advice Warning & Disclaimer' and 'Privacy'.

MLC MasterKey Investment Service Fundamentals

1 Applicant details 2 Investment facilities 3 Investment strategy 4 Other information 5 Adviser details
6 Attachments 7 Review 8 Submitted

* Indicates required field

Cancel Save As Draft Validate Page Next >

What type of account are you opening?

Account Type*

(select one) (select one) Individual Joint Partnership Trust Trust (for Minors) Superannuation Fund Company Other

Next >

Advice Warning & Disclaimer | Privacy

COMPLETING AN ONLINE APPLICATION

Search for an existing client

6. To prevent duplication of records, the online application will ask you to perform a search for an existing client before starting the online application.

Enter your client's Customer Number (if any), Name or Date of Birth and click **Search**.


If the search results produce a record of an existing client(s), their details will appear (example shown below). Clicking **Select** will pre-populate the online application form with their details. If no client(s) appear, or the online application is for a different client altogether, click **New Client**.

Search Results

There are 2 records that match the search criteria.

| MLC Customer Number | Full name | Date of birth | Address | |
|---------------------|---------------|---------------|-----------------------|------------------------|
| 999999995 | Helen Sample | 24/03/1952 | | Select |
| 999999999 | Mr Sam Sample | 24/03/1942 | 123 Smith Street 2000 | Select |

[New Client](#)[Advanced Search](#)

**MLC MasterKey Super Fundamentals**

* Indicates required field

Identify Applicant

Each MLC customer has a single identification number - the MLC Customer Number. If your client has existing accounts/policies with MLC, it's important that this new application be connected with their existing MLC Customer Number to ensure consolidated portfolio reporting and the correct calculation of fees, MasterKey fee refunds and adviser remuneration.

Search for an existing client

MLC Customer Number

First name

Surname

Date of Birth (DD/MM/YYYY)

Search

Smith

Search Results

There are no records that match your search criteria. Please select Advanced Search for further search options.

[New Client](#)[Advanced Search](#)

[Cancel](#)

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COMPLETING AN ONLINE APPLICATION

Cancel, Save as draft and Validate Page options

At the bottom of each section of the online application, you'll see options to **Cancel**, **Save as Draft** and **Validate Page**.

Cancel – lets you cancel the online application and any progress will be lost.

Save as Draft – lets you save the online application and return to it later.

Important: if your client is applying for a pension fundamentals or transfer to fundamentals account, and has an existing super or super fundamentals account, any transactional activity that occurs on the existing account between the saved as draft and resumed times will not be reflected in the application (eg contributions, changes to investment strategy). Therefore, when an application is resumed, please check that all of the details are still correct.

Validate page – lets you verify that the details you've entered into a section of the online application are correct before proceeding to the next section. Any incomplete or missing fields will be highlighted in red.


A validation of the entire online application will be automatically done at the last section of the online application (Review stage) and any sections requiring more information will be highlighted.

COMPLETING AN ONLINE APPLICATION

Section 1: Applicant details

Complete your client's personal and contact details and click **Next**.

If the new account is for an existing client, these fields will be pre-populated with their details. We suggest however that you check that they are still correct before proceeding to the next section.

**MLC MasterKey Super Fundamentals**
For: Sample

1 Applicant details

2 Investments

3 Investment facilities

4 Investment strategy

5 Beneficiary nomination

6 Other information

7 Adviser details

8 Identification

9 Attachments

10 Review

11 Submitted

* Indicates required field

Cancel

Save As Draft

Validate Page

Next >

Applicant details

Type of Applicant
NEW

Change Applicant

NAB Customer Number

Name

Title*
(select one)

First name*

Middle name(s)

Surname (Family name)*
Sample

Gender*
☐ Male ☐ Female

Date of birth

DD/MM/YYYY*

Tax File Number

TFN for individual*

Please note that where a valid TFN has not been provided, personal contributions will be rejected and additional tax will apply to employer contributions.

Residential Address (PO Box is NOT acceptable)

Type of Address*

☒ Australian ☐ Overseas

Address line 1*

Address line 2

Suburb/City/Town*

State/Territory/Province*
(select one)

Postcode/Zip Code*

Suburb Postcode Search

Postal Address

☐ Tick if the postal address is different to the residential address

Home phone number

Country code Area code Phone number

Work phone number

Country code Area code Phone number

Mobile

Email address

Email

Cancel

Save As Draft

Validate Page

Next >

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COMPLETING AN ONLINE APPLICATION

Section 2: Investments

(This section is not applicable for investment products)

Complete the Investment section by advising whether your client will be rolling over any funds into their new super account or making an initial contribution.

Then click **Next**.

**MLC MasterKey Super Fundamentals**
For: Sample

1 Applicant details

2 Investments

3 Investment facilities

4 Investment strategy

5 Beneficiary nomination

6 Other information

7 Adviser details

8 Identification: Sample

9 Attachments

10 Review

11 Submitted

* indicates required field

CancelSave As DraftValidate Page

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Rollover

Will you be transferring any amounts before starting this account?*

☒ Yes☐ No

Contributions

Initial Contributions

Are you making a single contribution?*

☐ Yes☐ No

Regular Contributions

You can make regular contributions from your bank. Any changes to bank details must be received in writing by MLC.

Are you making regular contributions?*

☐ Yes☐ No

CancelSave As DraftValidate Page

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COMPLETING AN ONLINE APPLICATION

Section 3: Investment facilities

Complete the Investment facilities section to confirm if your client will be establishing a Direct Debit Request Schedule to pay contributions to their new account from either their:


- Personal bank account
- Employer's bank account, or
- Credit card.

Then click **Next**.

HOW WE PROCESS CONTRIBUTIONS

If we receive a completed application and contribution before 3 pm (AEST/AEDT) on a business day, then it will generally be processed using the unit price(s) for that business day.

If we receive a completed application and contribution after 3 pm (AEST/AEDT) on a business day, then it will generally be processed using the unit price(s) for the following business day.

**MLC MasterKey Super Fundamentals**
For: Sample

1 Applicant details2 Investments3 Investment facilities4 Investment strategy5 Beneficiary nomination6 Other information7 Adviser details8 Identification: Sample9 Attachments10 Review11 Submitted

* Indicates required field

CancelSave As DraftValidate Page

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Investment Facilities

- A valid TFN must be provided.
- You cannot split the payment of a contribution (eg. personal) across 2 accounts.
- Telephone withdrawals will be activated using the financial institution details outlined in account one. This can be changed at anytime.
- You can transfer funds from your financial institution into your MLC account by using BPAY.
- BPAY details will be available once your application has been completed.
- If this application is received after 3pm, your payment request will be processed using the unit price for the next available business day.

Account One - Direct Debit Request Schedule

Are you making any payments via direct debit?

☒ Yes☐ No

> Account Details

Name of Financial InstitutionName of Account*

BSB*Account Number*

> Contribution Source*

☐ Employer☐ Initial☐ Regular

Click [here](#) to read the Direct Debit Request Schedule Agreement

Account Two - Direct Debit Request Schedule

Is there another bank account for payments via direct debit?

☐ Yes☒ No

Credit Card

Are you making payments via credit card?

☒ Yes☐ No

> Credit Card Details

Card Type*(select one)Cardholder Name (as it appears on card)*Card Number*

Expiry Month (MM)*Expiry Year (YYYY)*

> Contribution Source*

☐ Employer☐ Initial

CancelSave As DraftValidate Page

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COMPLETING AN ONLINE APPLICATION

Section 4: Investment strategy

Complete the Investment strategy section to confirm how your client would like their money invested.

If no investment strategy is nominated for a super or pension online application, your client's money will be invested into the **MLC Cash Fund**.

Then click **Next**.

**MLC MasterKey Super Fundamentals**
For: Sample

1 Applicant details

2 Investments

3 Investment facilities

4 Investment strategy

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11 Submitted

* Indicates required field

Cancel

Save As Draft

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MLC MasterKey Investment Protection

Would you like to add MLC MasterKey Investment Protection?^{*}

☐ Yes

☒ No

Investment Strategy

I instruct the Trustee to allocate 100% of my initial and future contributions and rollovers to the MLC Cash Fund or as specified below. In giving this instruction I have considered the information disclosed in the Investment Menu and determined that the investment option is appropriate for me.

- Initial Investment - shows how you want your initial contributions and / or rollover(s) allocated
- Ongoing Investment - shows how you want your regular and one-off contributions allocated in the future
- Fee Draw down Order - shows the investment option(s) from which your fees are to be deducted. Please number investment options in order of preference (1,2,3 etc). If this column is left blank, fees will be deducted pro rata on the value of each investment option in your account.

> Your Investment Options

| Investment Option | Initial Investment (%) | Ongoing Investment (%) | Fee Draw down Order |
|----------------------------------|------------------------|------------------------|------------------------|
| (select one) ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> ▼ |
| (select one) ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> ▼ |
| (select one) ▼ | <input type="text"/> | <input type="text"/> | <input type="text"/> ▼ |
| <div>Add Investment Option</div> | Total (%) | 0.00 | 0.00 |

Cancel

Save As Draft

Validate Page

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COMPLETING AN ONLINE APPLICATION

Section 5: Beneficiary nomination

(This section is not applicable for investment products)

Complete the Beneficiary nomination section to confirm if your client would like to nominate a non-lapsing binding or non-binding beneficiary.

Then click **Next**.


The screenshot displays the 'MLC MasterKey Super Fundamentals' online application interface. At the top, the MLC logo is on the left, and the title 'MLC MasterKey Super Fundamentals' is on the right, with 'For: Sample' below it. A progress bar shows 11 steps: 1 Applicant details, 2 Investments, 3 Investment facilities, 4 Investment strategy, 5 Beneficiary nomination (highlighted), 6 Other information, 7 Adviser details, 8 Identification: Sample, 9 Attachments, 10 Review, and 11 Submitted. Below the progress bar, a note states '* indicates required field'. The main section is titled 'Beneficiary nomination' and contains the question 'Would you like to nominate a beneficiary?' with radio button options for 'Yes' and 'No'. Below this is a section titled 'List of attached files' with the instruction 'Please attach a copy of the completed and signed binding beneficiary form.' and the status 'There are currently no attachments.' with an 'Attach File' button. At the bottom of the form, there are buttons for 'Cancel', 'Save As Draft', 'Validate Page', 'Previous', and 'Next'. The footer includes 'Copyright © MLC' on the left and 'Advice Warning & Disclaimer | Privacy' on the right.

COMPLETING AN ONLINE APPLICATION

Section 6: Other information

Complete the Other information section to confirm if your client would like to nominate an Authorised Representative, Adviser Service Fee and/or provide Marketing Consent.

Then click **Next**.

**MLC MasterKey Super Fundamentals**
For Sample

1 Applicant details

2 Investments

3 Investment facilities

4 Investment strategy

5 Beneficiary nomination

6 Other information

7 Adviser details

8 Identification: Sample

9 Attachments

10 Review

11 Submitted

* indicates required field

Cancel

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Authorised Representative

Do you wish to provide access to an authorised representative, other than your servicing Adviser?*

☒ Yes

☐ No

Adviser Service Fee

Have you negotiated an adviser service fee?*

☐ Yes

☐ No

Payment of Fees

Day of month to deduct fees (e.g. 15)

Marketing Consent

We always seek to better understand and serve your financial, e-commerce and lifestyle needs so we can offer you other products and services that aim to meet those needs as well as promotions or other opportunities. This applies to each organisation within the National Australia Group (the 'Group') including its banking, financing, funds management, financial planning, superannuation, insurance, broking and e-commerce organisations.

We request your consent to Group marketing activities. By giving your consent that you agree to receiving information about the products and services we have described, including by telephone calls to the numbers provided by you in this application or numbers you may provide later and by email if you have provided us with an email address. For this purpose, we may need to use and disclose your personal information amongst the Group, to your financial adviser, if any, and to service providers (for example, posting services). Your consent therefore includes the authority to use and disclose your personal information as described. We will not disclose health information.

Your consent will not change any specific product or service consent that you have given or will give in the future (for example, for a loyalty program or online direct marketing).

Do we have your consent?*

☒ Yes

☐ No

If you do not answer your consent will be presumed.

Your consent will continue until you withdraw it. You can withdraw your consent at any time by contacting the MLC Service Centre on 132 652.

Cancel

Save As Draft

Validate Page

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COMPLETING AN ONLINE APPLICATION


Section 7: Adviser details

Complete the Adviser details sections and provide any special instructions¹ that relate to the online application (eg additional commission instructions, insurance premiums).

Please note: Where special instructions are provided, the online application will require manual intervention that may cause a minor delay in processing (see page 22 for more details).

Then click **Next**.

¹ Special instructions is not available for investment products.

**MLC MasterKey Super Fundamentals**
For: Sample

1 Applicant details2 Investments3 Investment facilities4 Investment strategy5 Beneficiary nomination6 Other information7 Adviser details8 Identification: Sample9 Attachments10 Review11 Submitted

* Indicates required field

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Adviser One

Adviser Identification

Name of Adviser

Financial Adviser Number*

NAFP FIFN

Business phone number

Facsimile

Other contact methods

Financial Adviser Remuneration Split

Adviser Two

Is there a second adviser linked to the application?*

Yes

No

Adviser's Special Instructions

Do you have any special instructions that relate to this application?*

Yes

No

CancelSave As DraftValidate Page< PreviousNext >


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COMPLETING AN ONLINE APPLICATION

Section 8: Identification

Complete the Individual information section and confirm whether verified identification for your client will be accompanying the online application. If so, this section describes the acceptable forms of client identification that can be provided and attached to the online application.

Then click **Next**.

**MLC MasterKey Super Fundamentals**
For: Sample

1 Applicant details

2 Investments

3 Investment facilities

4 Investment strategy

5 Beneficiary nomination

6 Other information

7 Adviser details

8 Identification: Sample

9 Attachments

10 Review

11 Submitted

* Indicates required field

Cancel

Save As Draft

Validate Page

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Individual Information

» Name

Title

Given Name

Surname (Family name)

Sample

» Date of Birth

DD/MM/YYYY

» Residential Address (PO Box is NOT acceptable)

Type of Address?

Australian

Address line 1

Address line 2

Suburb/City/Town

State/Territory/Province

Postcode/Zip Code

» Identification

Do you wish to provide customer identification with this application?²⁶

☐ Yes

☐ No

Financial Planner Details

Financial Planner's Name

Area code

Phone number

AFS Licensee Name*

AFSL Number*

Cancel

Save As Draft

Validate Page

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Next »

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COMPLETING AN ONLINE APPLICATION

Section 9: Attachments

Complete the Attachments section by attaching any relevant documents to the online application.

Then click **Next**.

**MLC MasterKey Super Fundamentals**
For: Sample

1 Applicant details

2 Investments

3 Investment facilities

4 Investment strategy

5 Beneficiary nomination

6 Other information

7 Adviser details

8 Identification: Sample

9 Attachments

10 Review

11 Submitted

* indicates required field

Cancel

Save As Draft

Validate Page

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Attachments

Note: Please ensure any scanned attachments are legible. For best results, please set the formatting to scan in grey scale (not black & white, or colour).

File*

Choose File

No file chosen

Description

Document Type*

(select one)

Attach File

> List of attached files

There are currently no attachments.

Cancel

Save As Draft

Validate Page

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COMPLETING AN ONLINE APPLICATION

Section 10: Review


The Review section provides you with an opportunity to review the online application before submitting it to us.

Any sections that are incomplete or require more attention will be highlighted in **red**. Clicking on the section will return you to the section of the application so you can update those details.

Important: An online application can't be submitted until these sections have been completed and validated.

Any sections with optional fields that are incomplete or missing will be highlighted as a warning in **orange**. However, these warnings will not prevent you from submitting an online application.

Once you've read and agreed to the terms and conditions, click **Accept and Submit**.



MLC MasterKey Super Fundamentals

For: Sample
Document Reference: C401070017041229

1 Applicant details
2 Investments
3 Investment facilities
4 Investment strategy
5 Beneficiary nomination
6 Other information
7 Adviser details
8 Identification: Mr B Sample
9 Attachments
10 Review

11 Submitted

The following pages are incomplete

- 1. [Applicant details](#)
- 2. [Investments](#)
- 3. [Investment facilities](#)
- 4. [Investment strategy](#)
- 5. [Beneficiary nomination](#)
- 6. [Other information](#)
- 7. [Adviser details](#)
- 8. [Identification: Sample](#)

The following warnings are present

- 1. [Applicant details](#) You haven't entered your client's email address.
Please enter their email address so we can let them know such things as when their account has been set up and when their annual statement is available online.

Cancel
Save As Draft

Previous

Review

Please review these details carefully. You can select 'Previous' to change any of these details. Once you submit this application, you cannot make any further changes. When you are ready to submit this application, please accept Terms & Conditions.

[Go to Terms & Conditions to submit](#)

Applicant details

List of attached files - Application

There are currently no attachments.

Terms and Conditions

[Agreement to Adviser Terms and Conditions](#)

These terms and conditions apply to use of the MLC Online Application tool accessed via MLC's website www.mlc.com.au (the 'Site'). Please read these terms and conditions carefully. BY CLICKING ON THE "ACCEPT & SUBMIT" BUTTON YOU AGREE TO BE BOUND BY THESE TERMS AND CONDITIONS.

In these terms and conditions, references to "MLC", "us" and "our" means MLC Investments Limited or MLC Limited (the relevant MLC entity depends on the product and is set out in the relevant product disclosure statement). References to "Trustee" means MLC Nominees Pty Limited. References to "Adviser" are based on to the secure Adviser section of the Site. References to "applicant" with respect to insurance products means the insured.

In addition to the information accessible through the Site is subject to the [Advice Warning](#).

For more information, please see the following:

Accept and Submit
Decline and Save As Draft

Cancel
Save As Draft

Previous

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COMPLETING AN ONLINE APPLICATION

Confirmation of submission

Once you've submitted the application, you'll receive an on-screen confirmation with a reference number.


Print a copy of your online application

You can print or save a copy of the online application so that it can be signed by your client and filed for your records.

Please note: a signed copy of the online application does not need to be sent to us.

Print a coversheet

If you need to send us any paper documentation, including a coversheet, make sure that we can quickly match the online application with the documents.

**MLC**
For: Sample
Document Reference: C401070017020031

Congratulations!

Your MLC online application has been submitted for processing on **Mon, 22 July 2013 at 02:54 PM**

Your reference number is C401070017020031

1. Click on link below to print and or save the completed application for your reference
[Print final application now](#)
2. Click on link below to print a coversheet to be attached to any mailed correspondence that is required to be associated with this application
[Print coversheet now](#)
3. This application, if complete, will generally be processed within 5 business days
4. You can monitor the progress of your application on My Work Tracker when you log onto the mlc.com.au website
5. Please refer to the current MasterKey Super Fundamentals PDS "Terms and Conditions for Transactions" for unit price processing guidelines.

Your feedback is valued by MLC. If you wish to provide any feedback regarding Online Applications please contact us at platform_online_services@mlc.com.au

[Return to Home](#) [Exit](#)

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LOCATING SAVED AS DRAFT, SUBMITTED AND COMPLETED ONLINE APPLICATIONS

Applications that you've saved as a draft, submitted or have been completed can be found on the online applications homepage.


The online applications homepage can be accessed from the MLC AdviserOnline homepage by clicking **Apply online** and **MLC MasterKey**.

 **MLC Online Applications**

Welcome to online applications for MLC MasterKey.

[Please click here if first time user](#)






Start an online application

Select Product
(Select One) 

Apply now






Draft applications

[Hide draft applications](#)

| Reference  | Policy/Account Number  | Client Name  | Product  | Date last saved  |
|---|---|--|---|---|
| C403070013797078 | | | MasterKey Investment Service | 10/07/2013 Resume Print Delete |
| C403070016005747 | | | MasterKey Investment Service Fundamentals | 18/07/2013 Resume Print Delete |

Submitted applications

[Hide submitted applications](#)

| Reference  | Policy/Account Number  | Client Name  | Product  | Date Submitted  |
|---|---|--|---|--|
| C401070017020031 | | Sample | MasterKey Super Fundamentals | 22/07/2013 Review |

Completed applications

No completed applications currently exist
All Transfer to Fundamentals applications are currently not available

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HOW WE PROCESS AN ONLINE APPLICATION

In most cases, we'll be able to process the online application and set up an account for your client immediately.

We'll then send your client a Welcome email (if a valid email address has been provided) the next business day that will confirm your client's new account and provide details of how they can securely access their new account online.

This will be followed by a Welcome kit that provides comprehensive details of their new account.

You can check the status of an online application from the online applications homepage or **My Work Tracker**.

Click here to learn more about how My Work Tracker can help you manage your new business and administration requests.

WHEN AN ONLINE APPLICATION WILL REQUIRE MANUAL PROCESSING

If you've provided special instructions, or if we require additional documentation, or are awaiting the receipt of funds, we'll need to manually process parts of the application.

Although this may slightly affect the overall processing time of the application, we'll still be able to issue you with an account number for your client's new account within minutes of it being submitted.

USING MLC'S CLIENT DATA EXCHANGE FOR ONLINE APPLICATIONS

MLC's Client Data Exchange lets you send, receive and share client data between MLC AdviserOnline and your financial planning software.

This means you can setup MLC's Client Data Exchange to submit online applications to us from your financial planning software.

Click here to learn more about how MLC's Client Data Exchange can help your Business.

HELPFUL TIPS

Special instructions can delay the processing of an online application, and we therefore recommend that they are only provided if the instruction isn't already covered elsewhere in the application or cannot be provided at a later date.

Validating each section before proceeding to the next will let you complete and/or correct any fields on the spot, rather than having to return to them at the end of the process.

A **submitted online application** will appear as a **completed online application** once we've sent the Welcome Kit to your client.

For **compliance purposes**, we recommend filing a copy of the online application in your records.

Please remember to attach **coversheets** if you need to send us documentation or cheques so that we can quickly match them to your online application.

FREQUENTLY ASKED QUESTIONS

1. Can I still submit applications on paper?

Yes, although we encourage the use of online applications to ensure quick and accurate processing.

2. If you've identified an error in the online application after it's been submitted what do I do?

Please contact us as soon as possible so that we can advise the best way to have the error corrected.

3. Do I need the online application form signed by my client?

We don't require your client's signature to set up their account. However, you can print the application form after you've submitted it to us and file a signed copy in your records.

4. When will my client receive their Welcome Kit?

We'll usually send Welcome Kits to clients within 24 hours of their accounts being established. You can check the status of an application from the online applications homepage or My Work Tracker.

5. When will I be able to see my client's new account number?

Your client's account number will be available in My Work Tracker within 24 hours of the application being submitted.

HELP

For more information and assistance, please visit our MLC AdviserOnline **FAQs**, or call us on **133 652** between 8 am and 7 pm (AEST/AEDT).



